



User Manual

v 1.3 :: 1.10.2025





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Welcome.

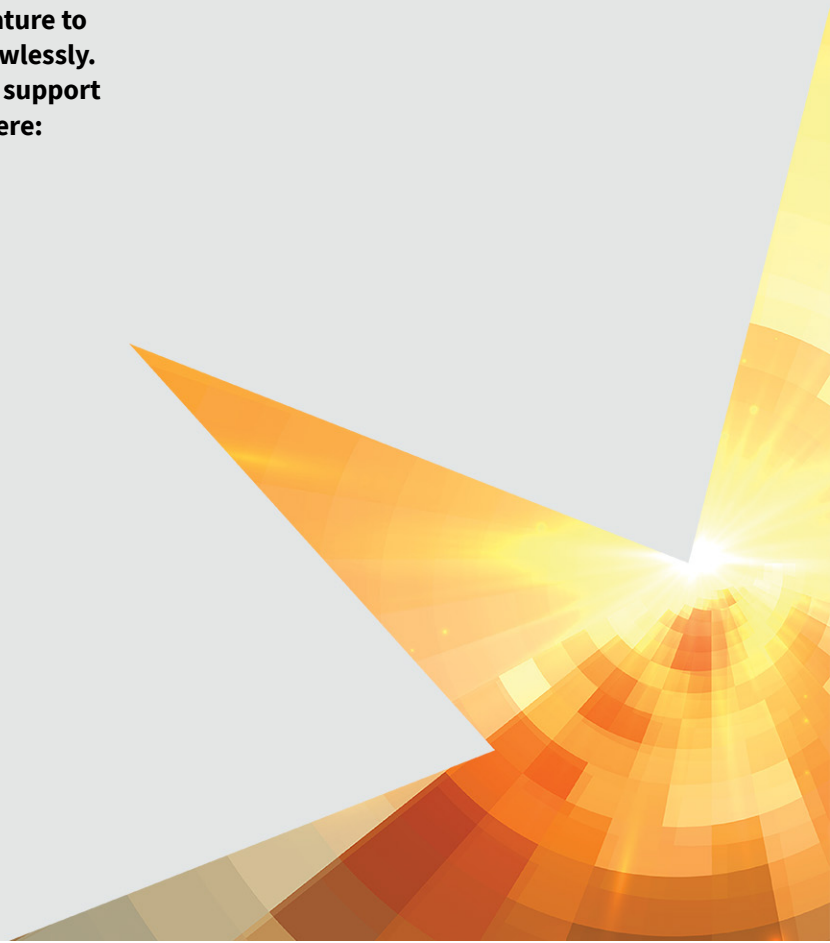
Captivate customers. Accelerate productivity & profits.

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 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:

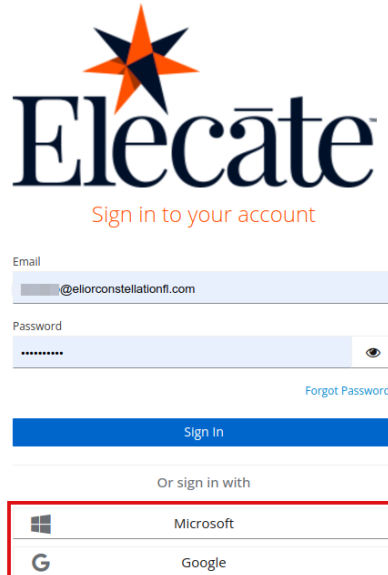
1. Enter your credentials; click on Sign In



The login form displays the Elecate logo and the text "Sign in to your account". It includes an "Email" field with the placeholder "@eliorconstellationfl.com", a "Password" field with masked characters and a visibility toggle, a "Forgot Password?" link, and a blue "Sign In" button highlighted with a red border.

Single Sign On

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



The Single Sign On form displays the Elecate logo and the text "Sign in to your account". It includes an "Email" field with the placeholder "@eliorconstellationfl.com", a "Password" field with masked characters and a visibility toggle, a "Forgot Password?" link, a blue "Sign in" button, and a section titled "Or sign in with" containing "Microsoft" and "Google" buttons, both highlighted with a red border.

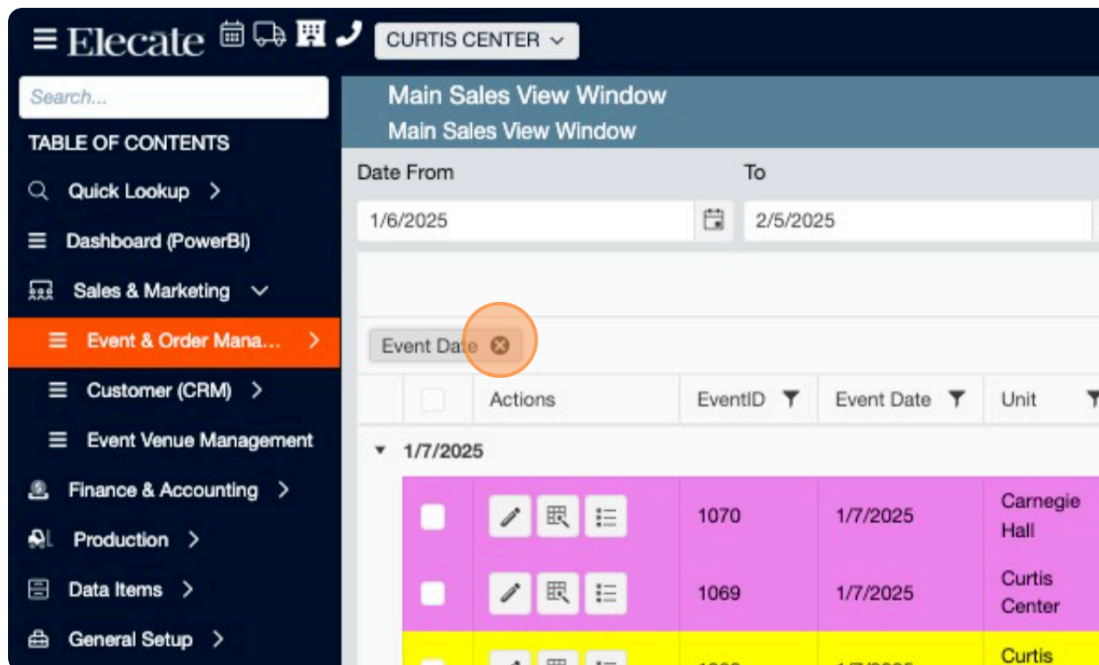
Home Page Quick Tour



- 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 | New |
| VE | CD | Internal - Stations | 1 | In-Process | New |
| ER - | Not Available | WEB ORDER | 6 | In-Process | New |
| ER - ED | BG | WEB ORDER | 100 | New | New |
| VE | Not Available | Internal - Promo Event | 1 | In-Process | New |

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 displays the 'Create New Customer Marketing Information' form within 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' (a dropdown menu), 'ID', 'Client or Company Name (1st Line)', 'Primary name (30-characters maximum)', 'Overflow name (30-characters maximum)', 'Contact', 'Dear', 'Admin Asst', and 'Title' (a dropdown menu). The 'Contact Address' section includes fields for 'Address', 'City', 'State', 'Country' (a dropdown menu with 'USA' selected), and 'Zip Code'. The 'Contact Info' section includes fields for 'Office or Primary Phone', 'Ext', 'Mobile', 'Home', 'Fax', 'Email', and 'Website'. Below the main form, there are sections for 'Marketing Info' and 'History'. At the bottom right, there is a 'Save' button. The form is framed by a blue header bar with the text 'Customer Marketing Management' and 'Create New Customer Marketing Information'. A left sidebar contains navigation links: 'Primary Contact', 'Billing', 'Additional Info', 'Notes', 'CRM', 'Calendar', 'Secondary Contact', and 'Cost Centers & Venues'. A bottom bar contains a 'New Event' button and a 'Save' button.


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*.

Customer Sales and Marketing Management - (ID#: 7485 - "Cikume Test")
Create & Edit Customer Sales and Marketing Information

Primary Contact | Billing | Additional Info | Notes | CRM | Calendar | Secondary Contact | Cost Centers & Venues | Email

Primary Contact Information

| | | | |
|---|---|--|--|
|  Allowed (.jpg, .png) <0 MB | Contact Name Organization: Javier test 003 ID: 7485 Client or Company Name (1st Line): "Cikume Test" Contact: Zoe Walker Admin Asst: Zoe Walker Title: 77777 | Contact Address Address: 05 Eliot Crossing City: Beltsville, State: MD Country: USA, Zip Code: 20705 | Contact Info Office or Primary Phone: (456) 789-0234 Mobile: (456) 789-0234 Home: () - - Fax: () - - Email: Zwalker@herzog.com Website: Include http:// or https:// |
| | | | |
| | | | |
| | | | |

Marketing Info

History

New Event

Save

Organization Editor
Create or Edit an Organization

Organization Type: Customer Organization Name: Google Create Organization

| Action | ID | Name | Contact | Address | City | State | Postal... | Sales Person |
|--|------|-----------------|------------------|--------------------|----------|-------|-----------|-----------------|
| <input checked="" type="checkbox"/> + Assign | 7471 | Zapata Inc | Elias J. Zapata | 1234 Hemmingway rd | Pasadena | TX | 77501 | Cassandra Swift |
| <input type="checkbox"/> + Assign | 7491 | No test1 | Elias Z | 123as | Pasadena | TX | 77501 | Cassandra Swift |
| <input type="checkbox"/> + Assign | 7493 | Elias Z Inc | Elias Zapata | 1234 | Pasadena | TX | 77504 | Barry Johnson |
| <input type="checkbox"/> + Assign | 7499 | Elias Hort Cent | EZ | 12dasd | Pasadena | TX | 77501 | Ben Giler |
| <input type="checkbox"/> + Assign | 7458 | Elias | EZ test 23 | 12345 test road | Pasadena | TX | 77501 | Cassandra Swift |
| <input type="checkbox"/> + Assign | 7452 | Elias | Mr Mr | 12345 test road | Pasadena | TX | 77501 | Ben Giler |
| <input type="checkbox"/> + Assign | 7466 | Elias Pancho 01 | Pancho Prueba 01 | 1234 test rd | Pasadena | TX | 77501 | Ben Giler |

1 - 9 of 9 items

Search...

| Action | Set Key Contact | Set Accounting Contact | ID | Name | Contact | City | State | Postal... | Sales Pe |
|-----------------------|-----------------|------------------------|----|------|---------|------|-------|-----------|----------|
| No records available. | | | | | | | | | |

0 - 0 of 0 items

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

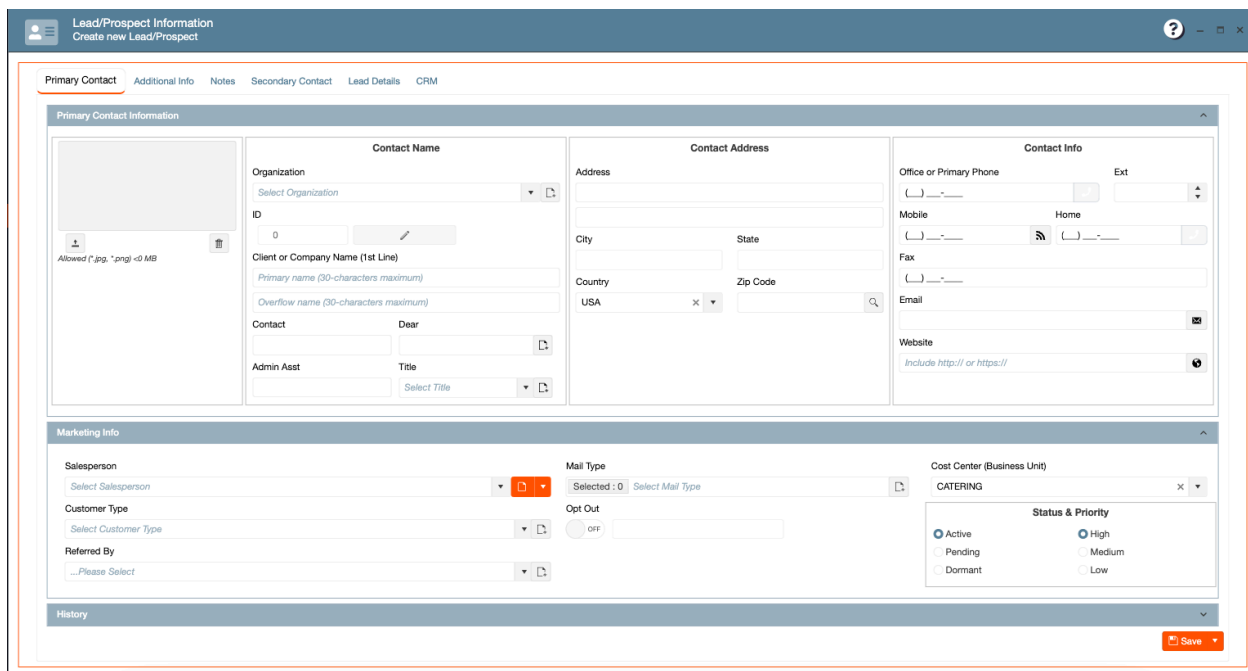
| Action | Set Key Contact | Set Accounting Contact | ID | Name |
|-----------------------------------|---|--|------|-------------|
| <input type="checkbox"/> Unassign | <input checked="" type="button" value="+ Set Key Contact"/> | <input type="button" value="Remove Accounting Contact"/> | 1030 | Zapata |
| <input type="checkbox"/> Unassign | <input type="button" value="+ Set Key Contact"/> | <input type="button" value="+ Set Accounting Contact"/> | 1055 | Javier |
| <input type="checkbox"/> Unassign | <input type="button" value="+ Set Key Contact"/> | <input type="button" value="+ Set Accounting Contact"/> | 1048 | Elias CRM t |

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

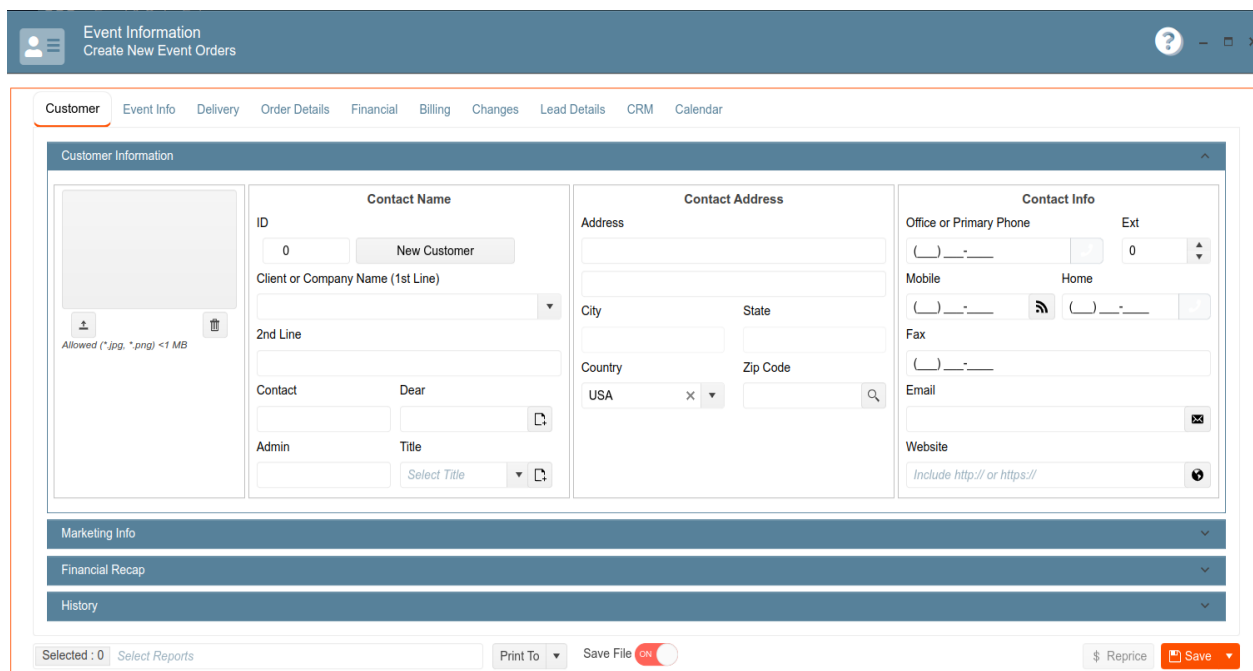


Creating Events and Event Orders

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



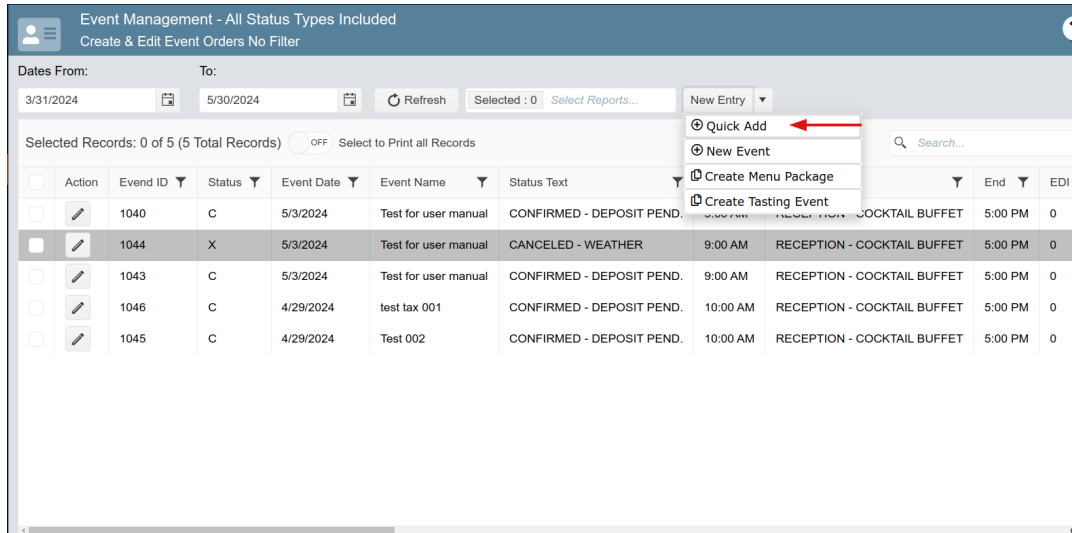
The screenshot displays the 'Event Information' window with the 'Create New Event Orders' tab selected. The interface includes a top navigation bar with a user icon, a search icon, and window controls. Below this is a horizontal tab bar with options: Customer (selected), Event Info, Delivery, Order Details, Financial, Billing, Changes, Lead Details, CRM, and Calendar. The main content area is titled 'Customer Information' and contains several input fields organized into sections: 'Contact Name' (ID, New Customer button, Client or Company Name (1st Line), 2nd Line, Contact, Dear, Admin, Title), 'Contact Address' (Address, City, State, Country, Zip Code), and 'Contact Info' (Office or Primary Phone, Ext, Mobile, Home, Fax, Email, Website). There are also expandable sections for 'Marketing Info', 'Financial Recap', and 'History'. At the bottom, there is a status bar showing 'Selected : 0', a 'Select Reports' button, a 'Print To' dropdown, a 'Save File' button with a red 'ON' indicator, a '\$ Reprice' button, and a 'Save' button with a red icon.

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

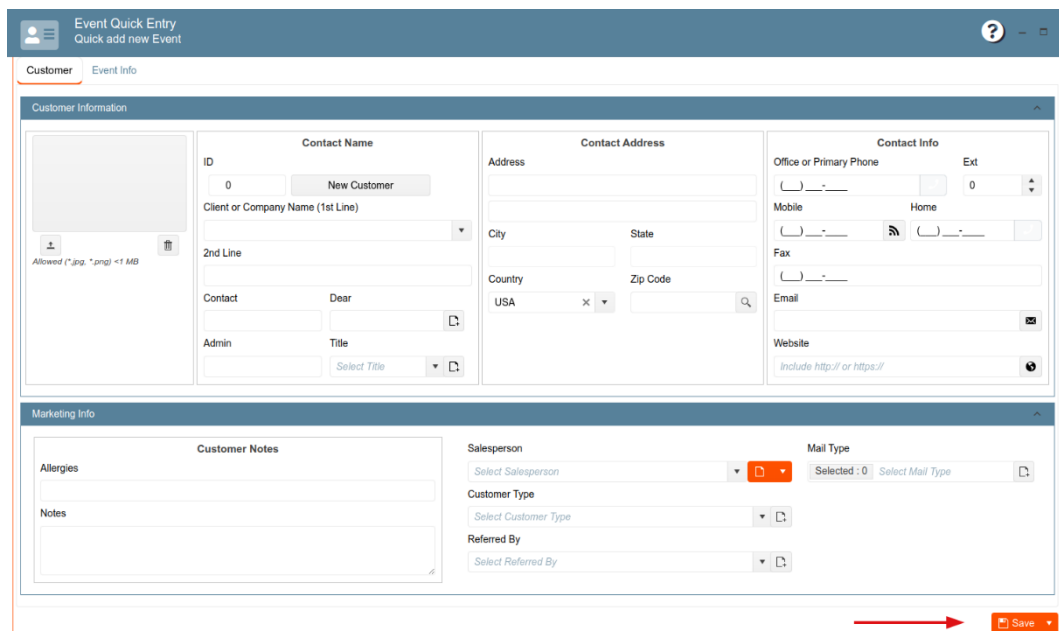
To quickly capture the basic details of a new event, users can use the Quick Event feature.

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*



The screenshot shows the 'Event Management - All Status Types Included' interface. At the top, there are date filters (3/31/2024 to 5/30/2024) and a 'New Entry' dropdown menu. The dropdown menu is open, showing options: 'Quick Add', 'New Event', 'Create Menu Package', and 'Create Tasting Event'. A red arrow points to 'Quick Add'. Below the menu is a table of event records with columns: Action, Event ID, Status, Event Date, Event Name, Status Text, and Event Details. The table contains five records, with the second record (ID 1044) highlighted in gray.

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




The screenshot shows the 'Event Quick Entry' pop-up window. It has two tabs: 'Customer' and 'Event Info'. The 'Customer' tab is active, showing a form with sections for 'Customer Information' and 'Marketing Info'. The 'Customer Information' section includes fields for ID, Contact Name, Address, City, State, Country, Zip Code, and Contact Info (Office or Primary Phone, Mobile, Home, Fax, Email, Website). The 'Marketing Info' section includes fields for Customer Notes, Salesperson, Customer Type, Referred By, and Mail Type. A red arrow points to the 'Save' button at the bottom right.



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

Customer Billing Information

Existing Customer

Krissia Castro test 5

Existing Contact

Krissia Castro

Existing Status

Confirmed - Deposit Pend.

Existing Date

Friday, May 3, 2024

New Event Name

Test for user manual

New Customer



Krissia Castro test 5

New Status

Confirmed - Deposit Pend.

New Event Date

5/3/2024

Filter Departments to Copy


☐ Menu

☐ Beverage

☐ Equipment

☐ Staff

☐ Miscellaneous



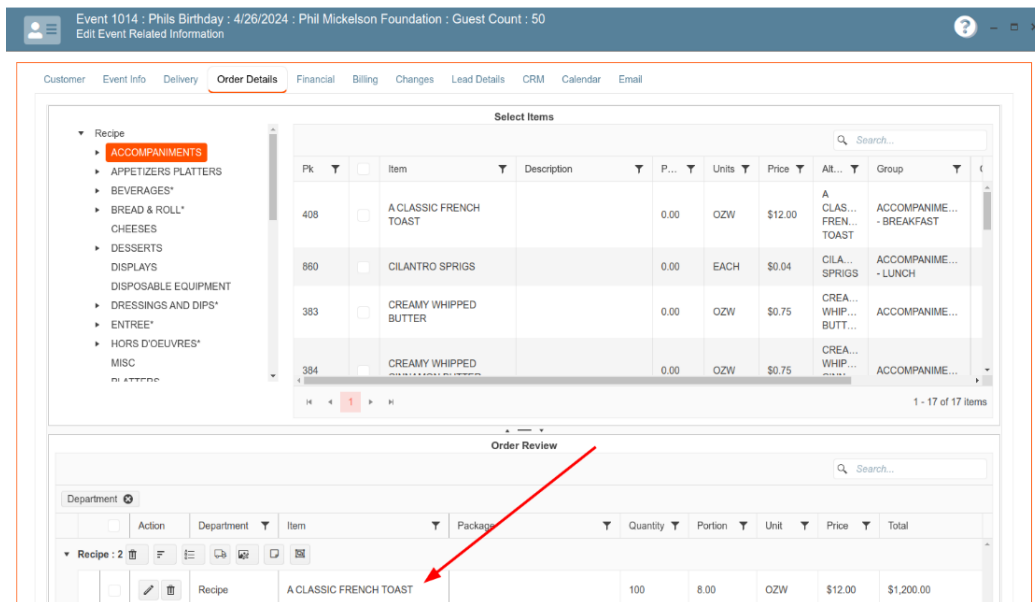
Managing Event Orders

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*.



Event 1014 : Philis Birthday : 4/26/2024 : Phil Mickelson Foundation : Guest Count : 50
Edit Event Related Information

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

Recipe
 ▶ ACCOMPANIMENTS
 ▶ APPETIZERS PLATTERS
 ▶ BEVERAGES*
 ▶ BREAD & ROLL*
 ▶ CHEESES
 ▶ DESSERTS
 ▶ DISPLAYS
 ▶ DISPOSABLE EQUIPMENT
 ▶ DRESSINGS AND DIPS*
 ▶ ENTREE*
 ▶ HORS D'OEUVRES*
 ▶ MISC
 ▶ PLATTERS

Select Items

| Pk | Item | Description | P... | Units | Price | Alt... | Group |
|-----|--------------------------|------------------------|------|-------|-------|---------|-------------------------|
| 408 | <input type="checkbox"/> | A CLASSIC FRENCH TOAST | | 0.00 | OZW | \$12.00 | A CLAS... FREN... TOAST |
| 860 | <input type="checkbox"/> | CILANTRO SPRIGS | | 0.00 | EACH | \$0.04 | CILA... SPRIGS |
| 383 | <input type="checkbox"/> | CREAMY WHIPPED BUTTER | | 0.00 | OZW | \$0.75 | CREA... WHIP... BUTT... |
| 384 | <input type="checkbox"/> | CREAMY WHIPPED BUTTER | | 0.00 | OZW | \$0.75 | CREA... WHIP... BUTT... |

1 - 17 of 17 items

Order Review

Department

| Action | Department | Item | Package | Quantity | Portion | Unit | Price | Total |
|--------------------------|------------|------------------------|---------|----------|---------|------|---------|------------|
| <input type="checkbox"/> | Recipe | A CLASSIC FRENCH TOAST | | 100 | 8.00 | OZW | \$12.00 | \$1,200.00 |

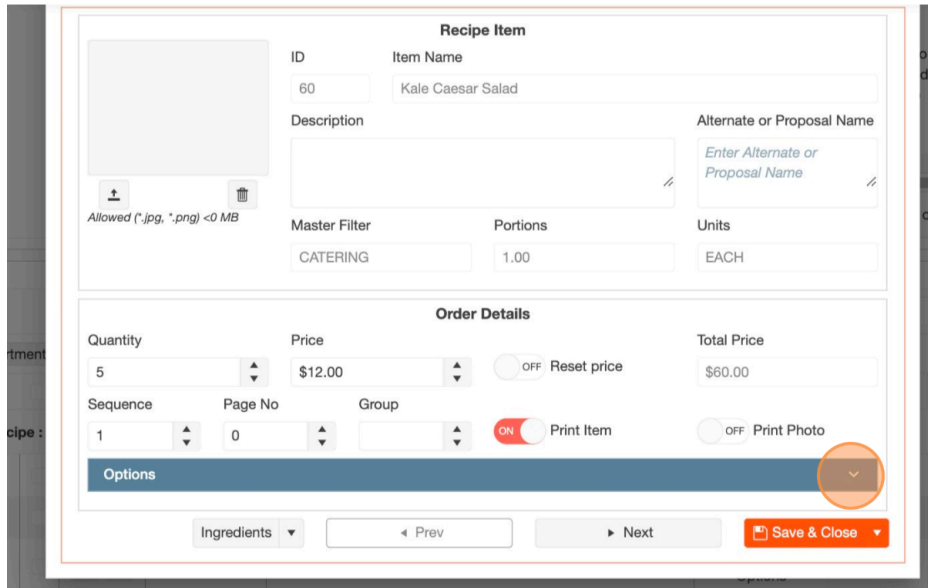
Important: To save items, the event entry must have been completed and saved first.

Indicating Production Location

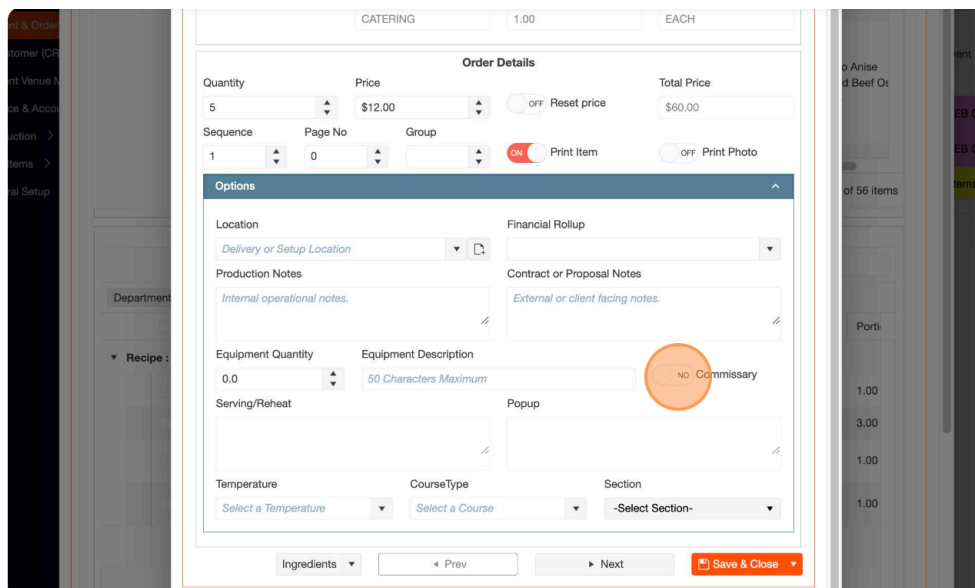
If an operation produces recipes out of both the commissary and the on-premise location, the Commissary toggle can be used to indicate who should produce a given item. When adding a recipe to an event order, follow the below steps to indicate the production location:

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



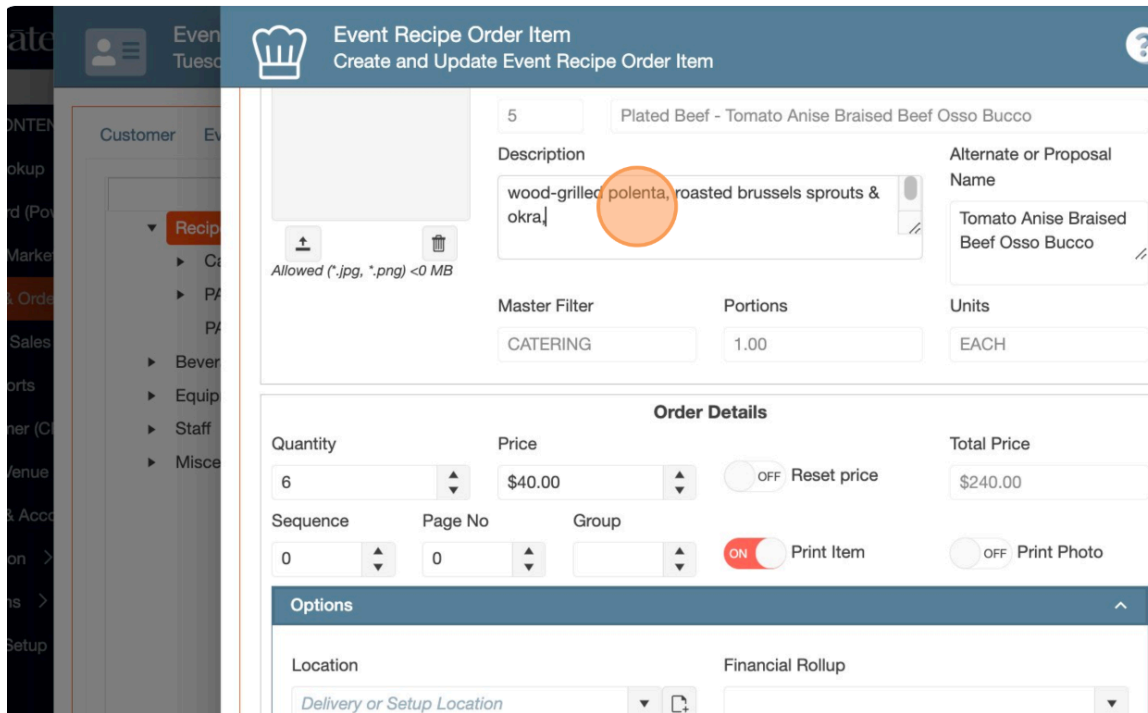
9. Locate the *Commissary* toggle and switch it to No or Yes, according to your desired production location
10. Click on save and close
11. The new items will appear under *Order Review*.



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

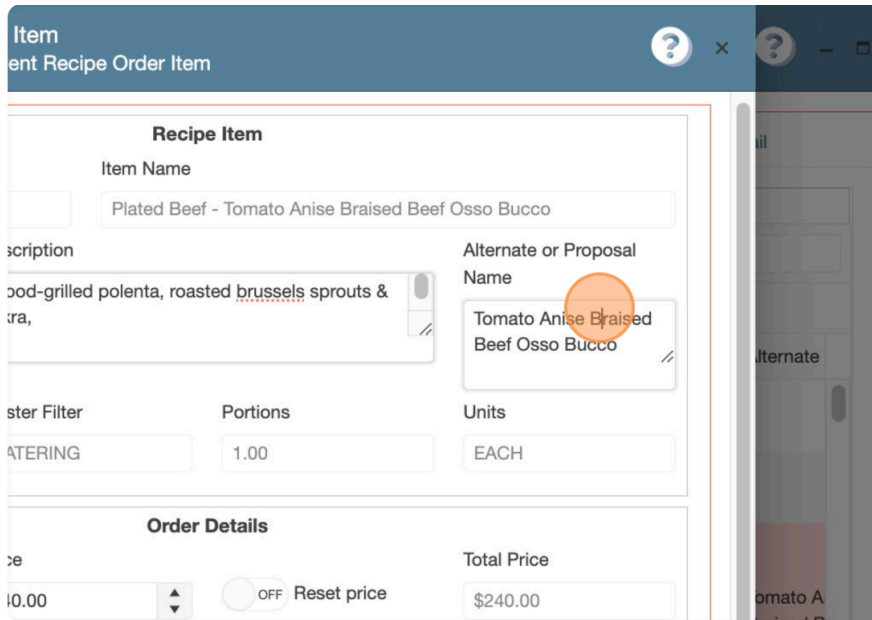
Quantity: 6 Price: \$40.00 Total Price: \$240.00

Sequence: 0 Page No: 0 Group:

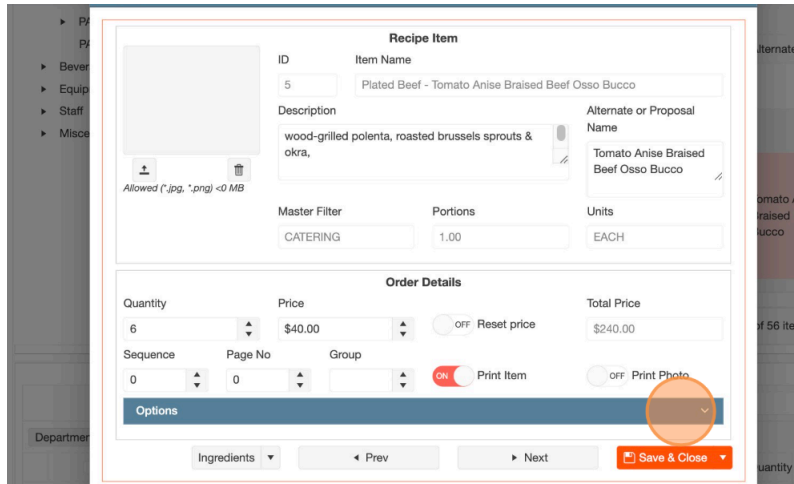
Print Item: ON Print Photo: OFF

Options

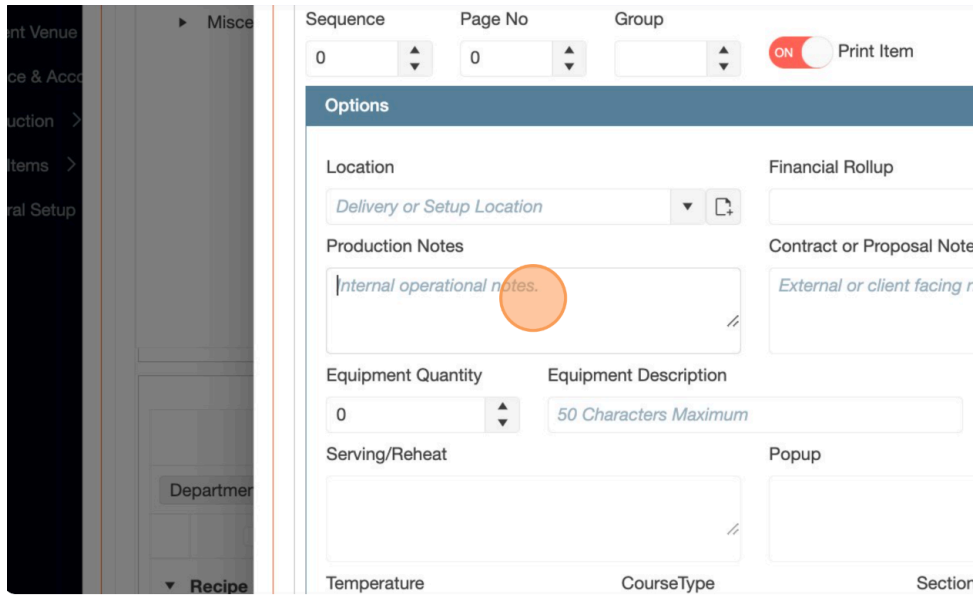
Location: Delivery or Setup Location Financial Rollup:



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



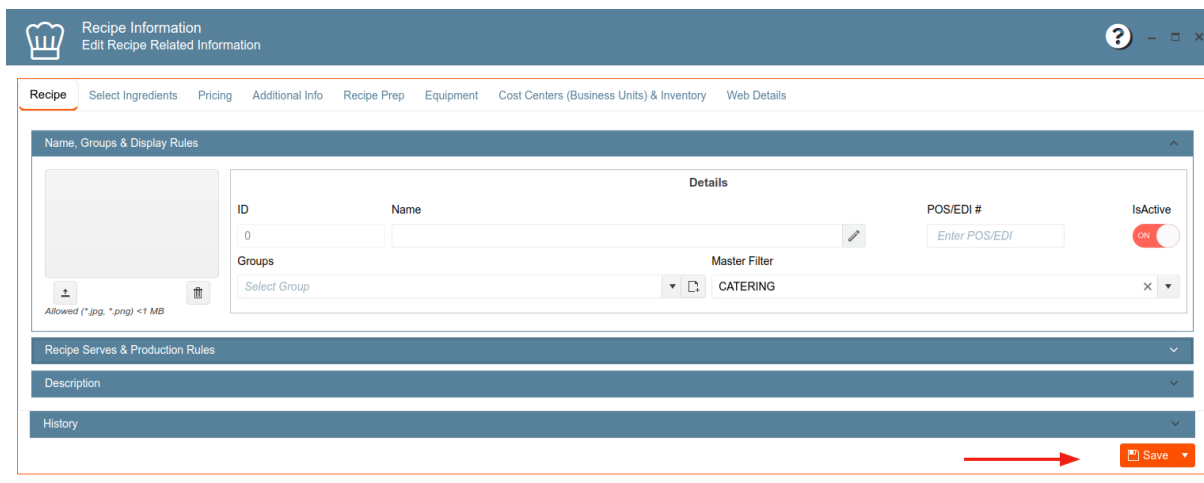
11. Click *Save & Close*

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 Elior

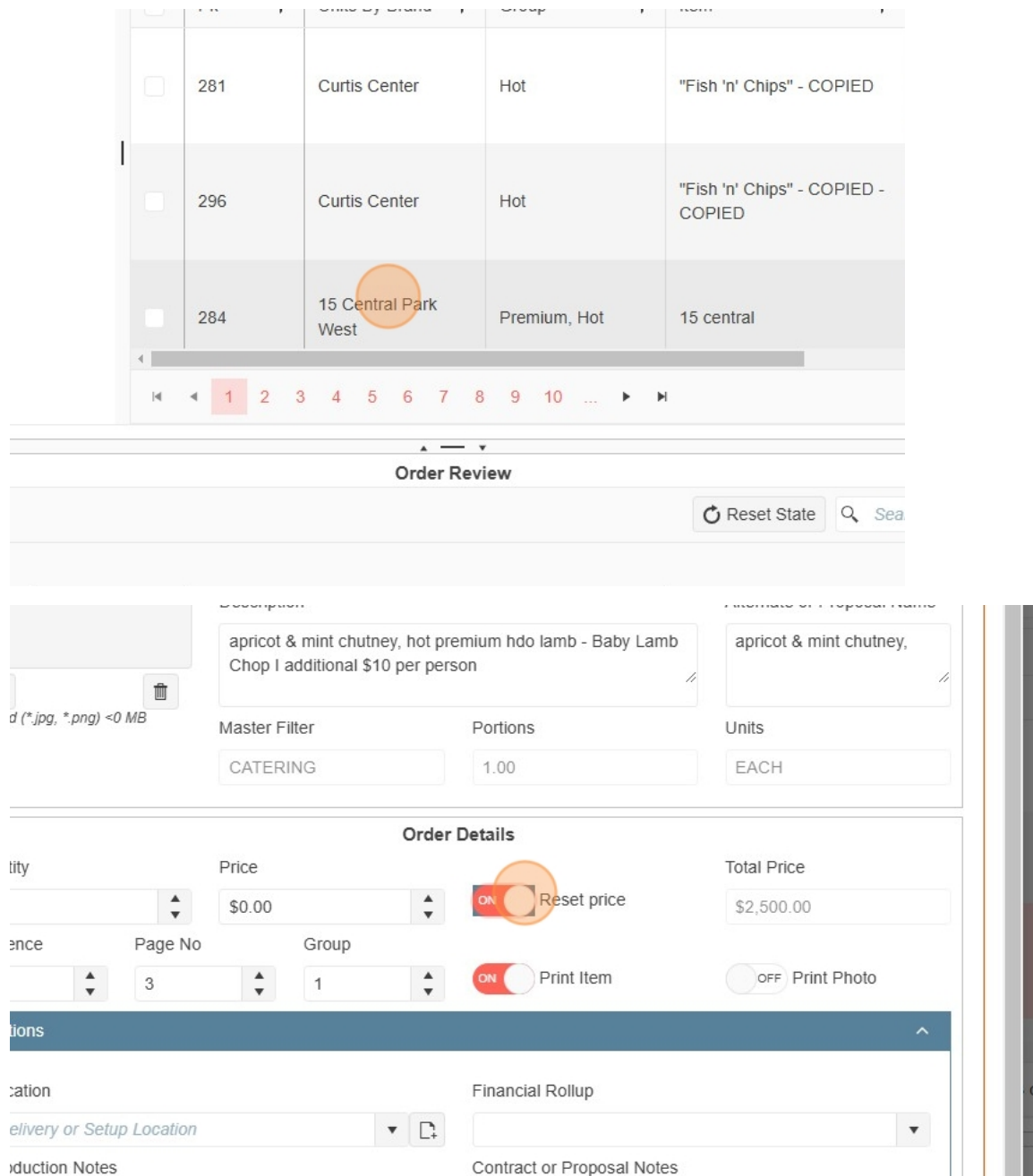
1. Click on Data Items section located on the left panel
2. Select *Food Management* and the *Food Department* window will appear
3. Select Recipe Management (On the fly)
4. Click on the New Entry button, and the Recipe Information window displays
5. Complete the fields and click save



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



| Item | Qty | Event by Name | Group | Item |
|--------------------------|-----|----------------------|--------------|------------------------------------|
| <input type="checkbox"/> | 281 | Curtis Center | Hot | "Fish 'n' Chips" - COPIED |
| <input type="checkbox"/> | 296 | Curtis Center | Hot | "Fish 'n' Chips" - COPIED - COPIED |
| <input type="checkbox"/> | 284 | 15 Central Park West | Premium, Hot | 15 central |

Order Review

Reset State

apricot & mint chutney, hot premium hdo lamb - Baby Lamb Chop I additional \$10 per person

apricot & mint chutney,

Master Filter: CATERING

Portions: 1.00

Units: EACH

Order Details

Quantity:

Price: \$0.00

Total Price: \$2,500.00

Reset price

Page No: 3

Group: 1

Print Item

Print Photo

Location: delivery or Setup Location

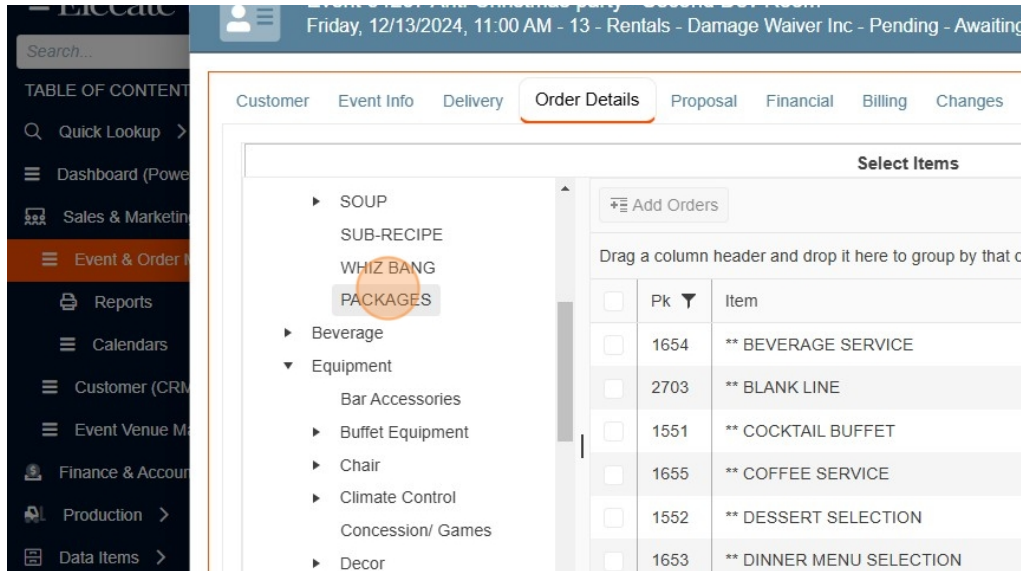
Financial Rollup

Production Notes

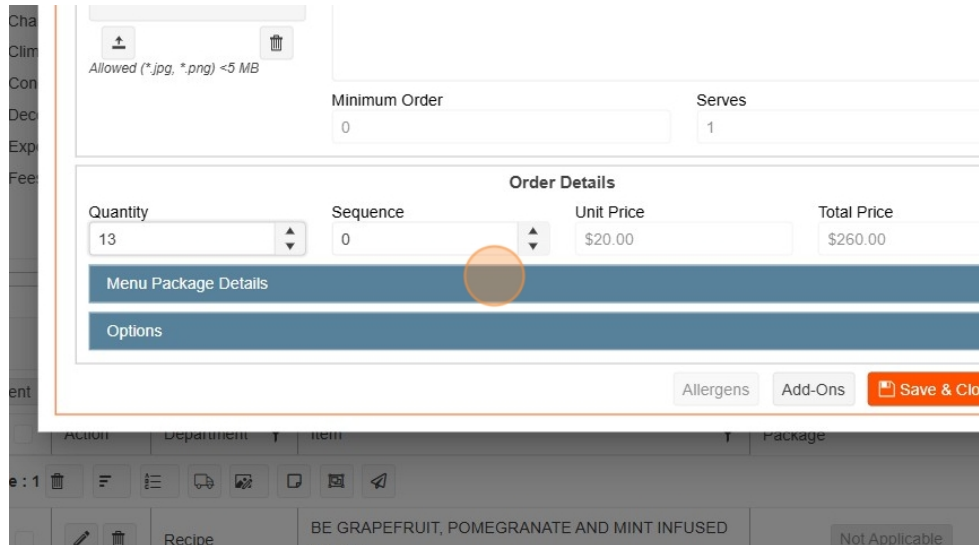
Contract or Proposal Notes

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

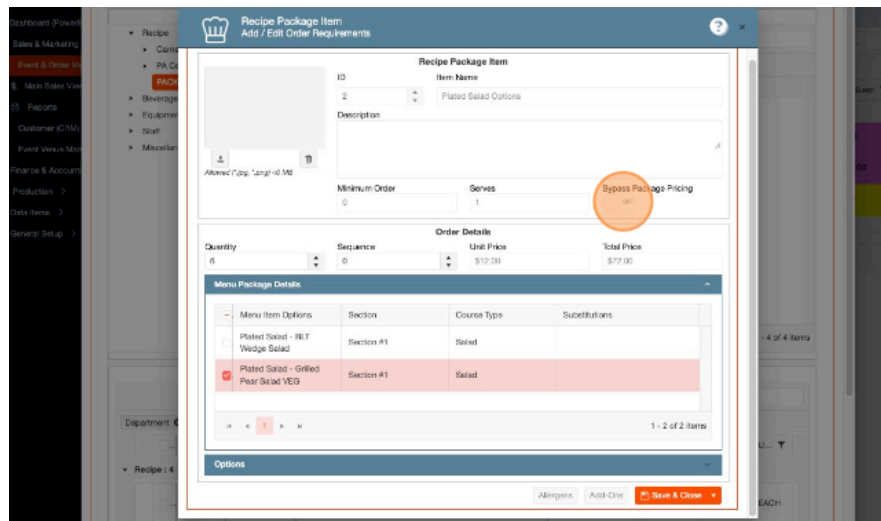


8. In the *Select Items* pane, double click on an item
9. Users enter the quantity and sequence of a package on this page
10. To view the details of the package, expand the section called *Menu Package Details*
 - a. From here users can add individual items or the entire package by making checking and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



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

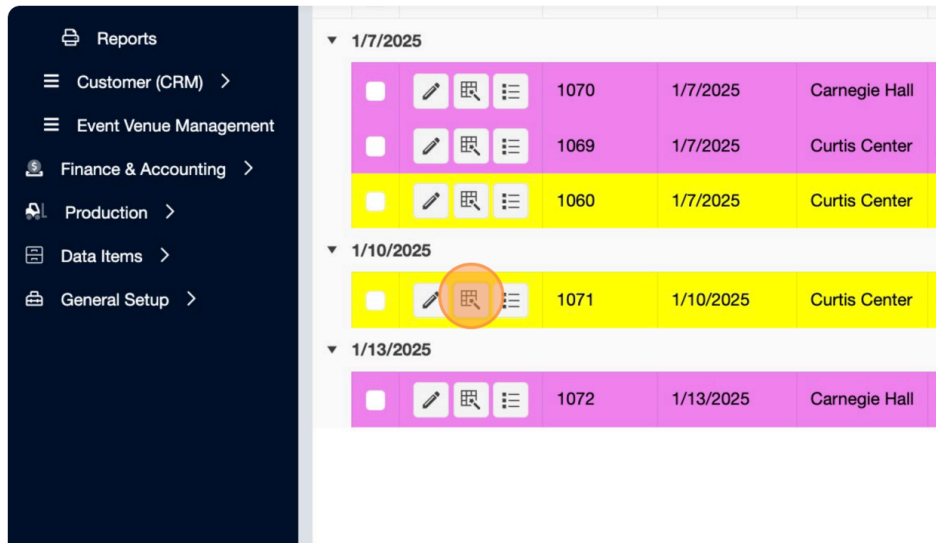
Tip: The *Bypass Package Pricing* toggle allows users to see how a package was set up. If the toggle is OFF, the items are priced as a set, offering a “package price”. If the toggle is ON, each component of a package is priced individually.



Building a Menu Using the Menu Builder

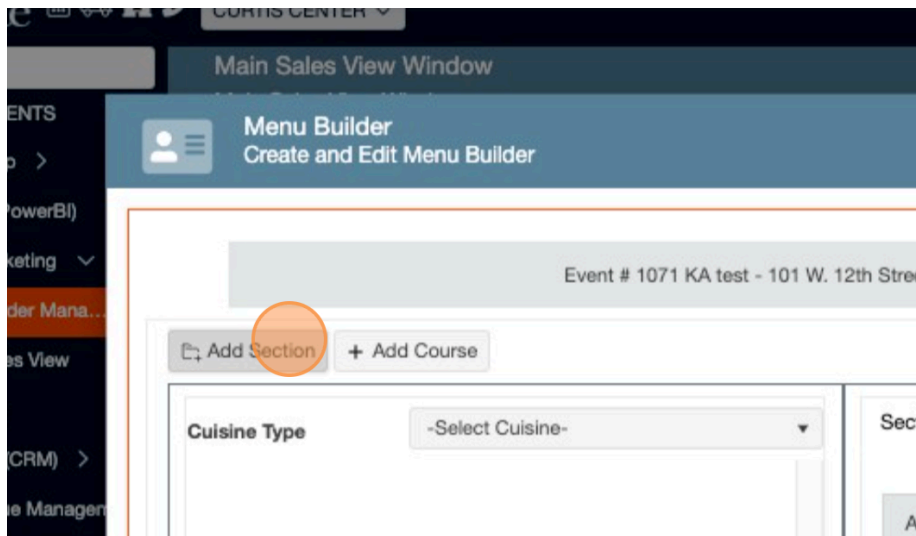
The Menu Builder window allows users to quickly add recipes and beverages and visualize how they will appear on a proposal.

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 | Event ID | Event Name |
|-----------|----------|---------------|
| 1/7/2025 | 1070 | Carnegie Hall |
| | 1069 | Curtis Center |
| | 1060 | Curtis Center |
| 1/10/2025 | 1071 | Curtis Center |
| 1/13/2025 | 1072 | Carnegie Hall |

- 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.



Menu Builder
Create and Edit Menu Builder

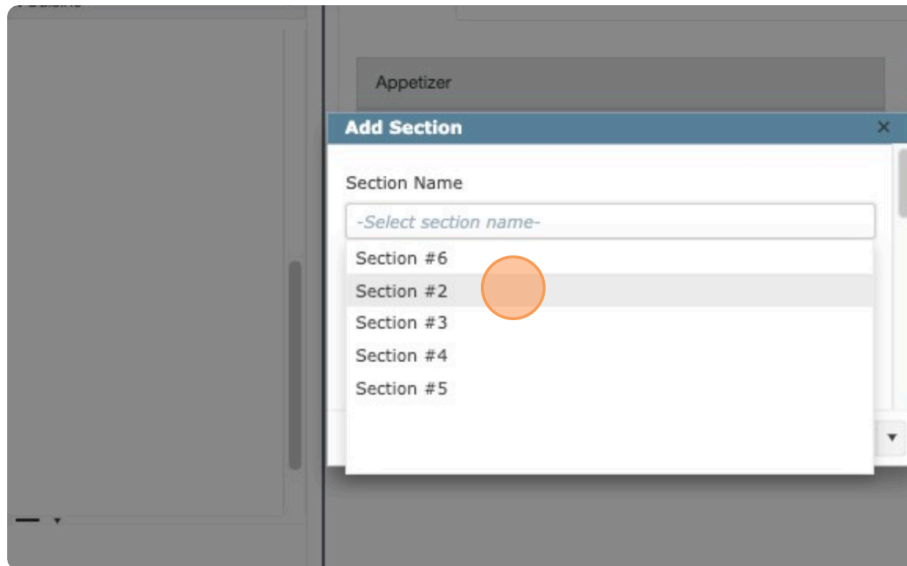
Event # 1071 KA test - 101 W. 12th Street

Add Section + Add Course

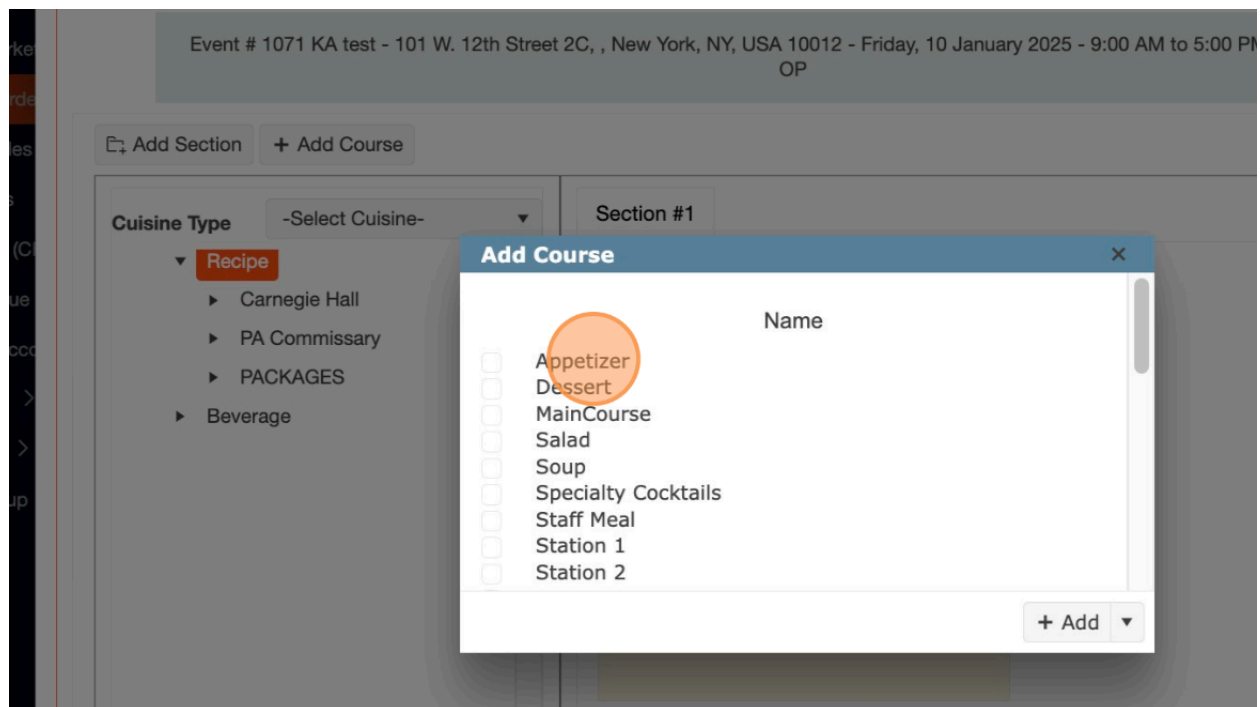
Cuisine Type: -Select Cuisine-

Secti

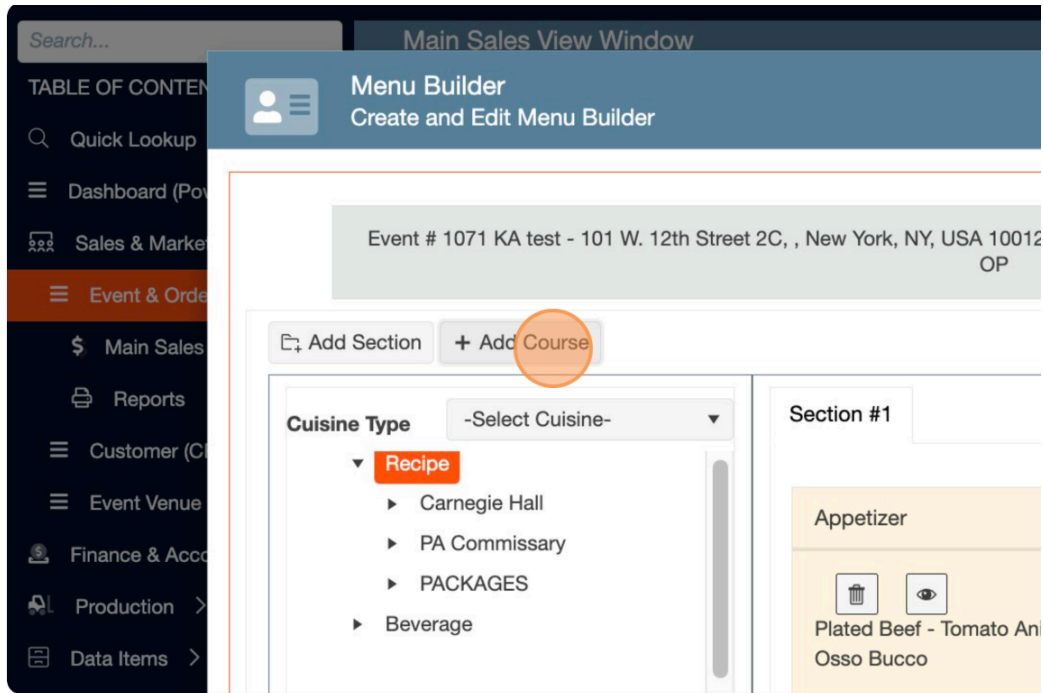
- Click the Section Name field and add the desired Section Number.



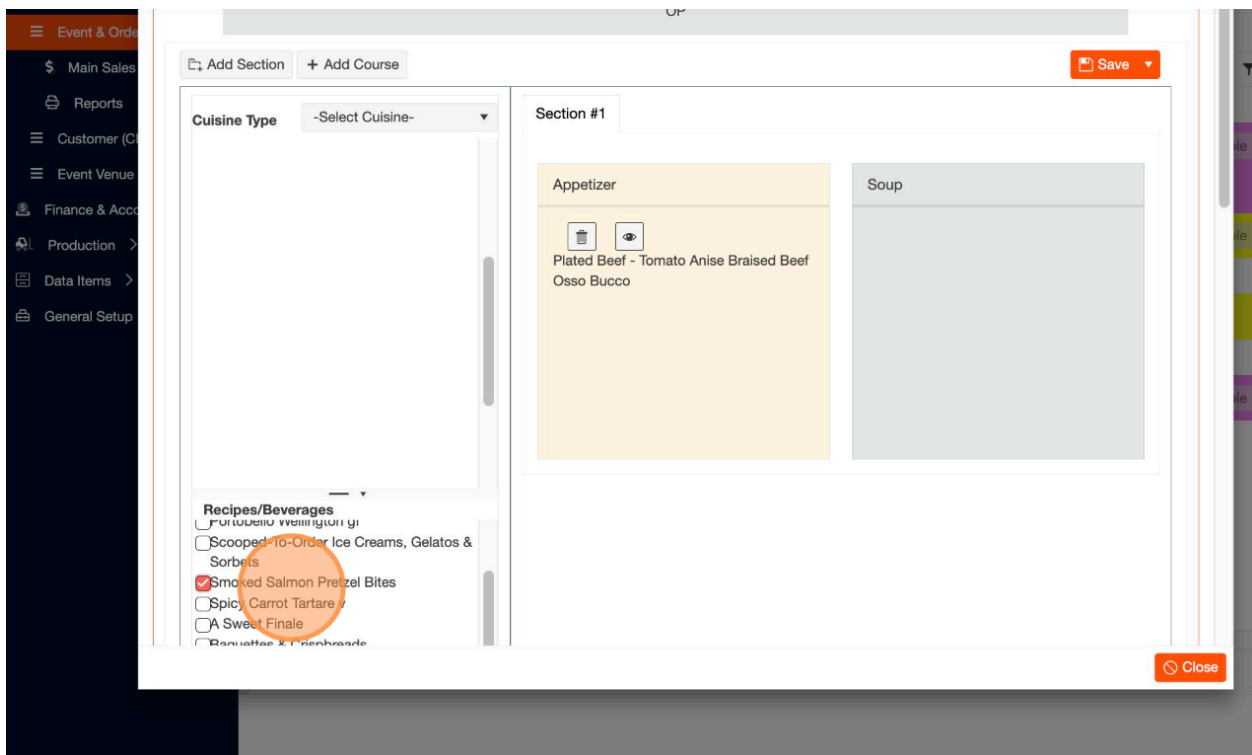
7. Then add the *Courses* to fall within the new *Section*, by checking as many of the default options as desired. *Courses* provide a grouping mechanism for recipes. Some examples include First Course, Main Course and Dessert.

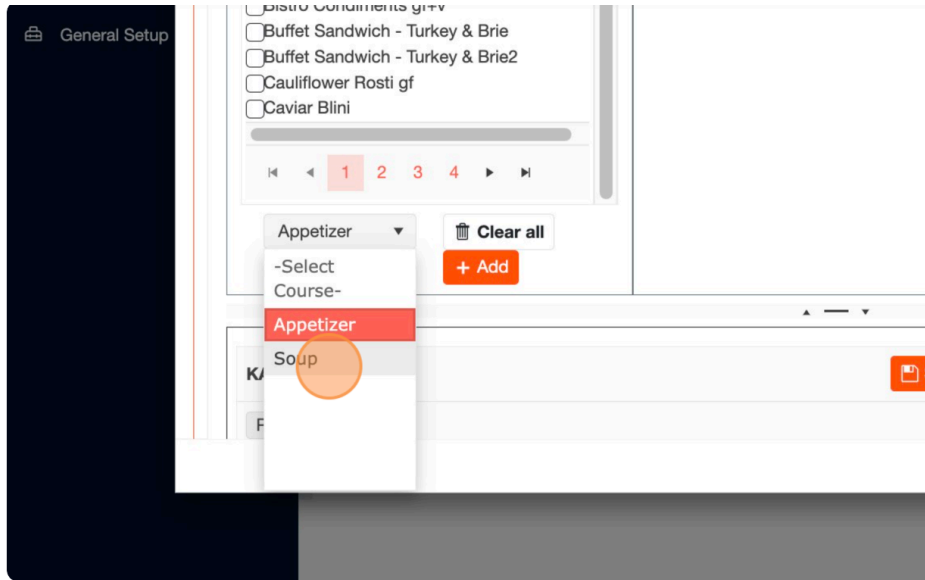


8. To add additional *Courses* or *Sections*, the buttons in the left corner of the Menu Builder window can be used.

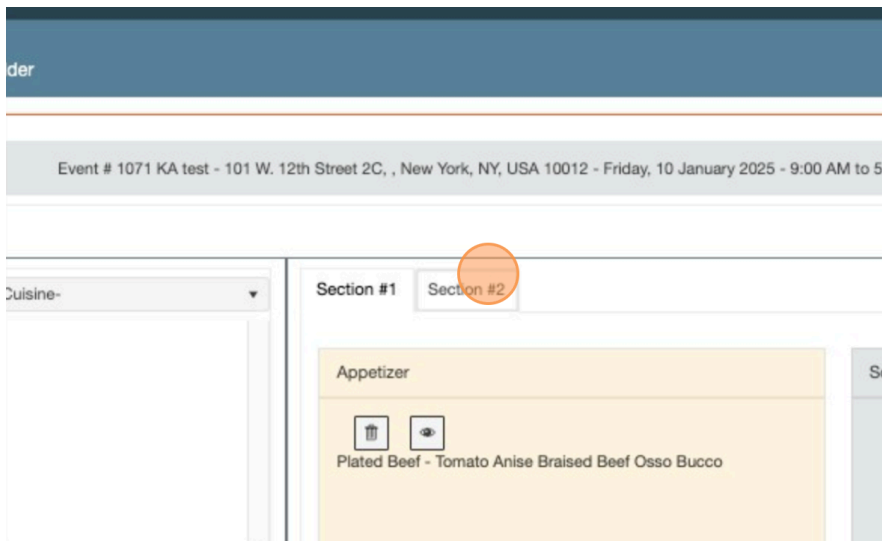


9. Finally, add *recipes* to the *courses*. Use the group tree on the left-hand side to locate the items you'd like to add to the proposal. Select the check box for a recipe or recipes you'd like to add, then select the course from the list of drop-down values as shown and click *Add*.





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

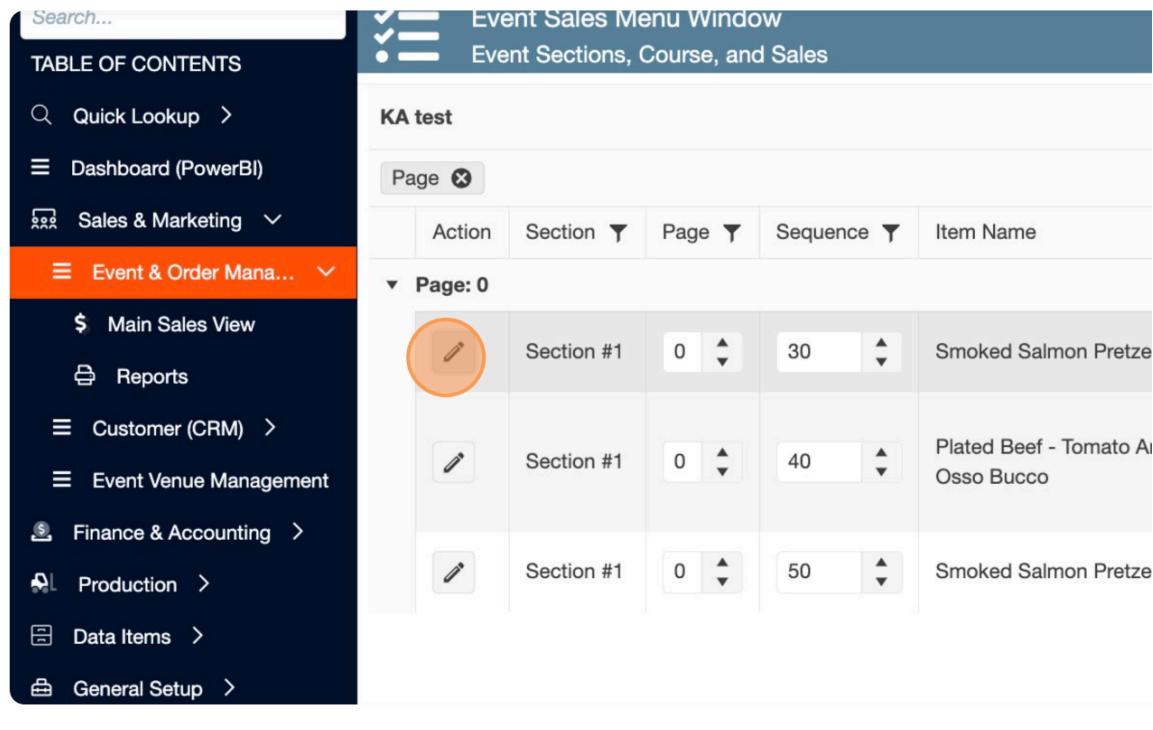
Once a user has added recipes to their order, via order details or the Menu Builder, the Event Sales Menu Window can be used to quickly reorganize and prepare a menu to be shown to a client. Follow the steps below:

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



| ▼ 1/7/2025 | | | | | |
|--------------------------|--|--|------|-----------|---------------|
| <input type="checkbox"/> | | | 1070 | 1/7/2025 | Carnegie Hall |
| <input type="checkbox"/> | | | 1069 | 1/7/2025 | Curtis Center |
| <input type="checkbox"/> | | | 1060 | 1/7/2025 | Curtis Center |
| ▼ 1/10/2025 | | | | | |
| <input type="checkbox"/> | | | 1071 | 1/10/2025 | Curtis Center |
| ▼ 1/13/2025 | | | | | |
| <input type="checkbox"/> | | | 1072 | 1/13/2025 | Carnegie Hall |

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



| Event Sales Menu Window | | | | |
|-------------------------------------|------------|--------|------------|---------------------------------------|
| Event Sections, Course, and Sales | | | | |
| KA test | | | | |
| Page <input type="text" value="0"/> | | | | |
| Action | Section ▼ | Page ▼ | Sequence ▼ | Item Name |
| | Section #1 | 0 | 30 | Smoked Salmon Pretze |
| | Section #1 | 0 | 40 | Plated Beef - Tomato Ai Osso Bucco |
| | Section #1 | 0 | 50 | Smoked Salmon Pretze |

6. The following columns can be edited:

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

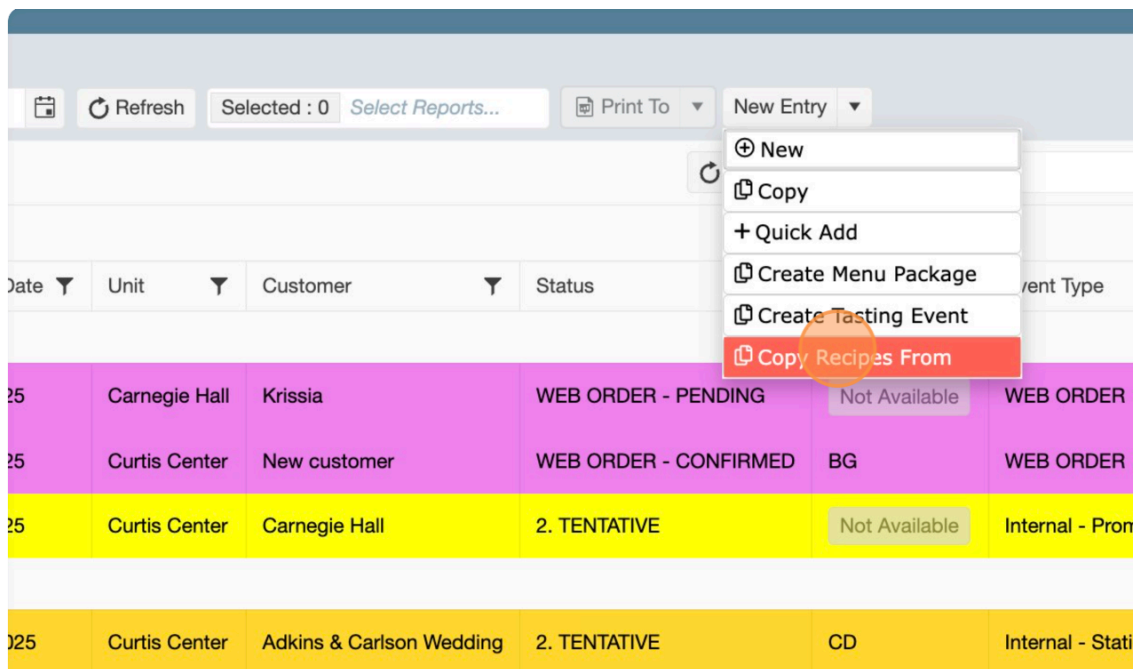
Reminder: when users change the item name or description, they will be forced to enter production notes (the last column on the Event Sales Menu Window)

- 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.

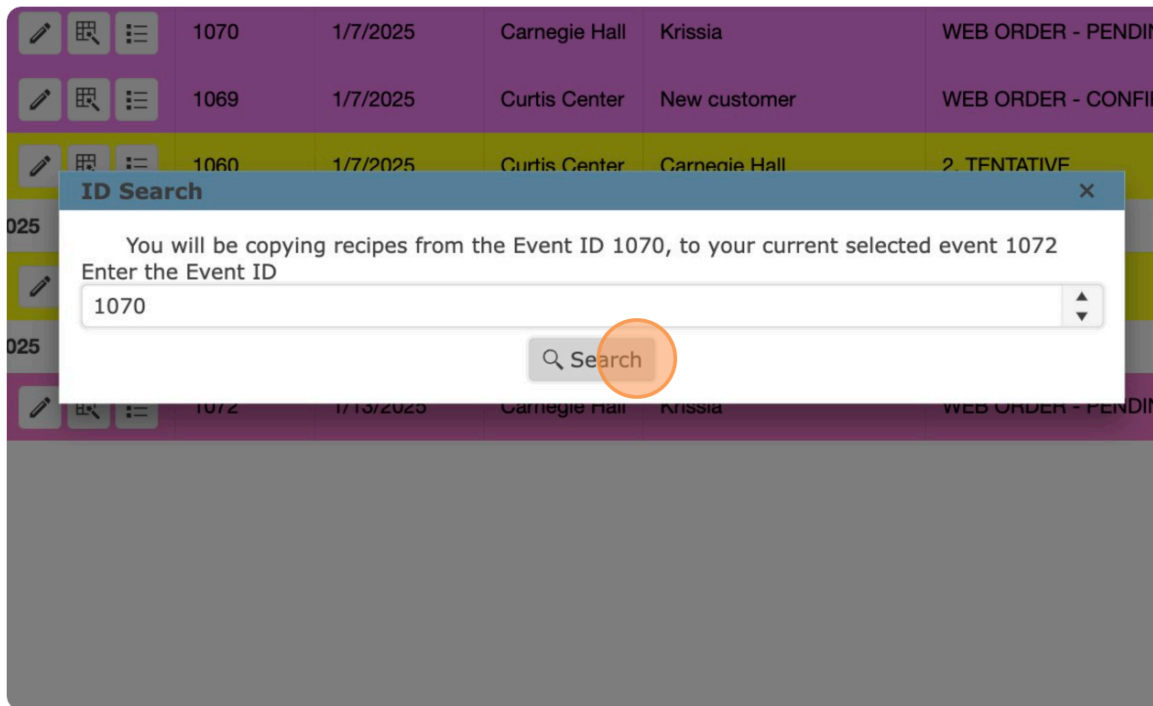
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included* or *Main Sales View Window*
4. Select the event that you want to copy recipes *to* by checking 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*



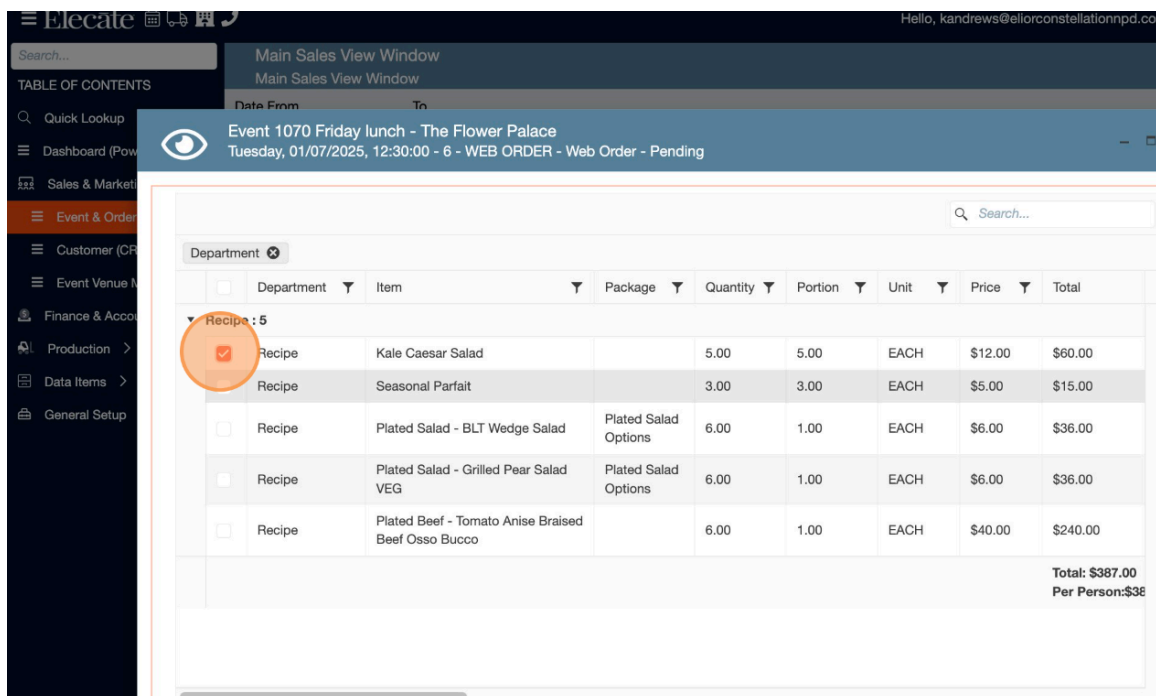
The screenshot shows the 'Event Management' window. At the top, there is a toolbar with buttons for 'Refresh', 'Selected : 0', 'Select Reports...', 'Print To', and 'New Entry'. A dropdown menu is open from the 'New Entry' button, showing options: 'New', 'Copy', '+ Quick Add', 'Create Menu Package', 'Create Tasting Event', and 'Copy Recipes From' (highlighted in red). Below the toolbar is a table with columns: 'Date', 'Unit', 'Customer', 'Status', and 'Event Type'. The table contains several rows of event data, including 'Carnegie Hall', 'Curtis Center', and 'Adkins & Carlson Wedding'.

| 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 |

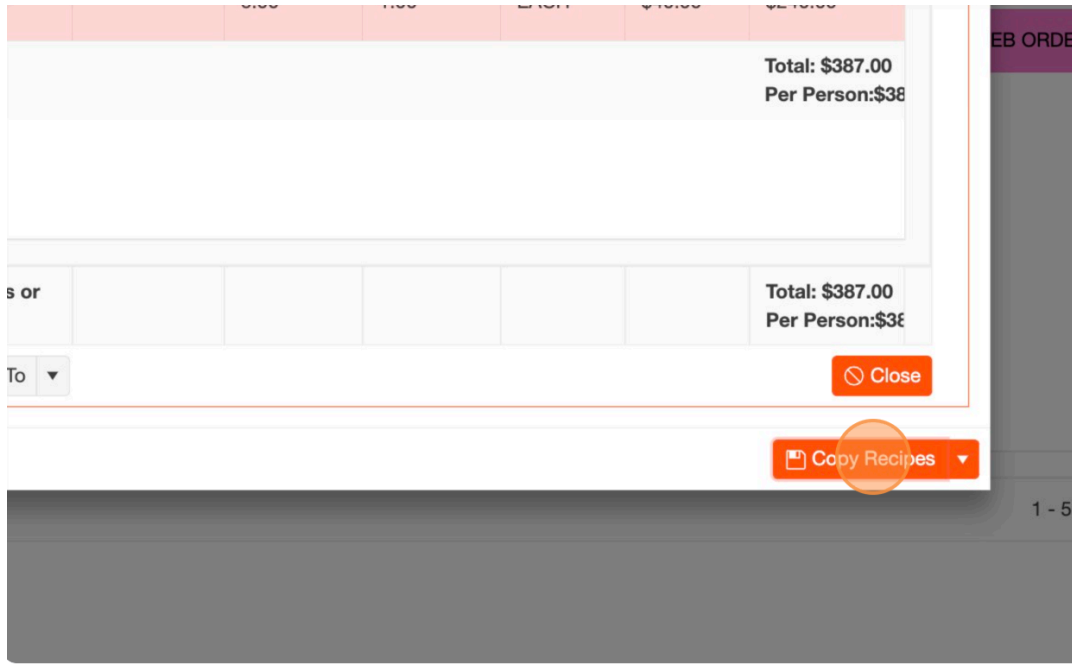
7. The *ID Search Window* will pop up. Users will now enter the Event ID number that they would like to copy *from*.



- 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*

Event 1014 : Phils Birthday : 4/26/2024 : Phil Mickelson Foundation : Guest Count : 50
Edit Event Related Information

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

Select Items

| Pk | Item | Description | Po... | Units | Price | Alt... | Group |
|----|---------------|-------------|-------|-------|--------|--------|--------------------|
| 2 | AMSTEL RETAIL | | 0.00 | EACH | \$4.50 | | BEER - IMP CANBOTL |

Order Review

| Department | Action | Department | Item | Package | Quantity | Portion | Unit | Price | Total |
|--------------|--------|------------|---------------------------|---------|----------|---------|------|--------|--|
| | | Recipe | ASIAN SESAME NOODLE SALAD | | 50 | 6.40 | OZL | \$3.00 | \$150.00 |
| | | | | | | | | | Total: \$1,350.00 Per Person: \$27.00 |
| Beverage : 2 | | | | | | | | | |
| | | Beverage | AMSTEL RETAIL | | 50 | | EACH | \$4.50 | \$225.00 |
| | | Beverage | AMSTEL RETAIL | | 50 | | EACH | \$4.50 | \$225.00 |
| | | | | | | | | | Total: \$450.00 Per Person: \$9.00 |

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

keti
Order
(CR
ue M
ccol
>
>
up

Recipe

- ▶ Carnegie Hall
- ▶ PA Commissary
- PACKAGES
- ▼ Beverage
 - ▶ 15 Central Park West
 - ▶ Abigail Kirsch
 - ▶ CCG PA
 - ▶ New York Botanical Gar
 - PACKAGES**
- ▼ Equipment
 - ▶ CCG PA
 - ▶ Curtis Center
 - PACKAGES
- ▼ Staff
- Back

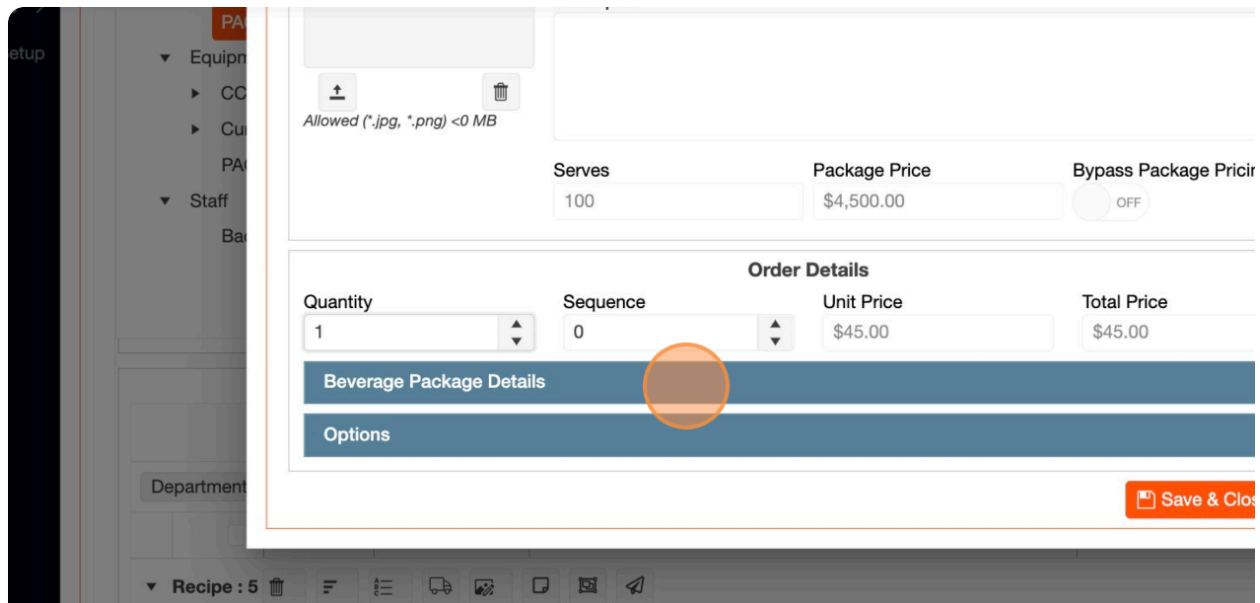
Add Orders

Items per Page

Drag a column header and drop it here to group by that column

| | P.. | Item | Descr |
|-------------------------------------|-----|---|-------|
| <input checked="" type="checkbox"/> | 3 | Constellation - Wedding 5hrs 100 Guests | |
| <input type="checkbox"/> | 1 | Full Bar Support | |
| <input type="checkbox"/> | 4 | Full Bar Support | |

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*

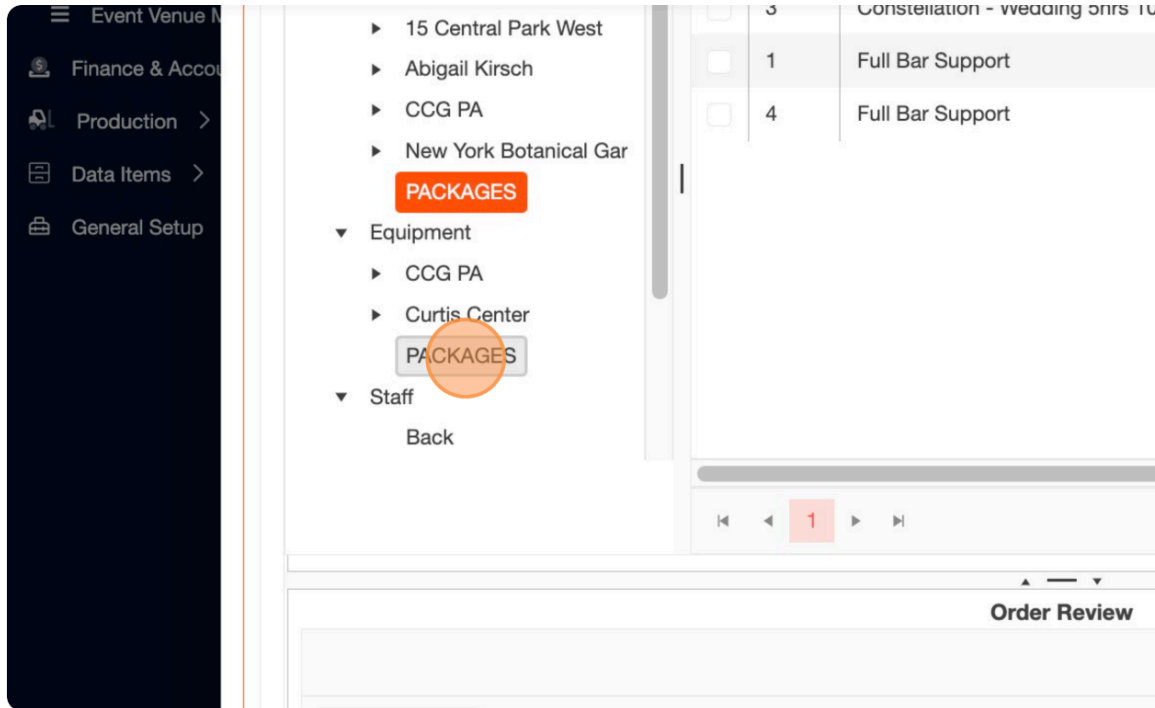
From the event window you can add items in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

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*

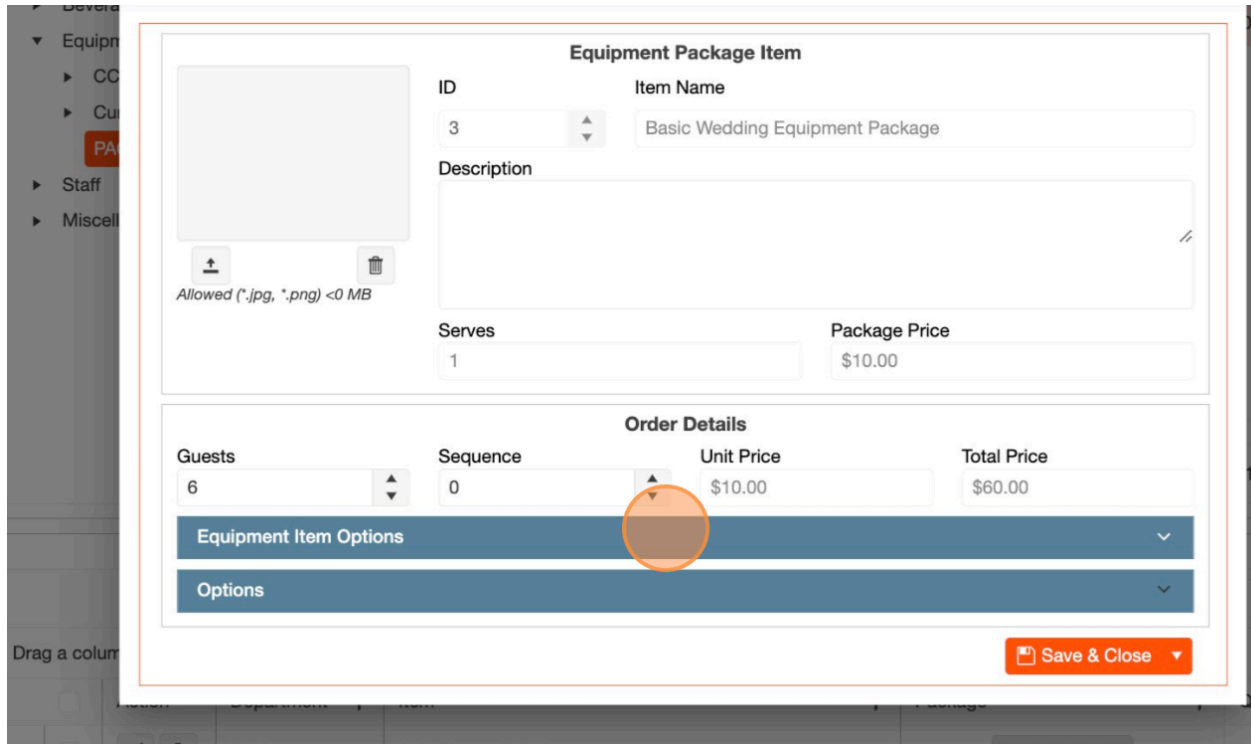
Important: To save items, the event entry must have been completed and saved first.

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



Equipment Package Item

ID: 3 Item Name: Basic Wedding Equipment Package

Description:

Serves: 1 Package Price: \$10.00

Order Details

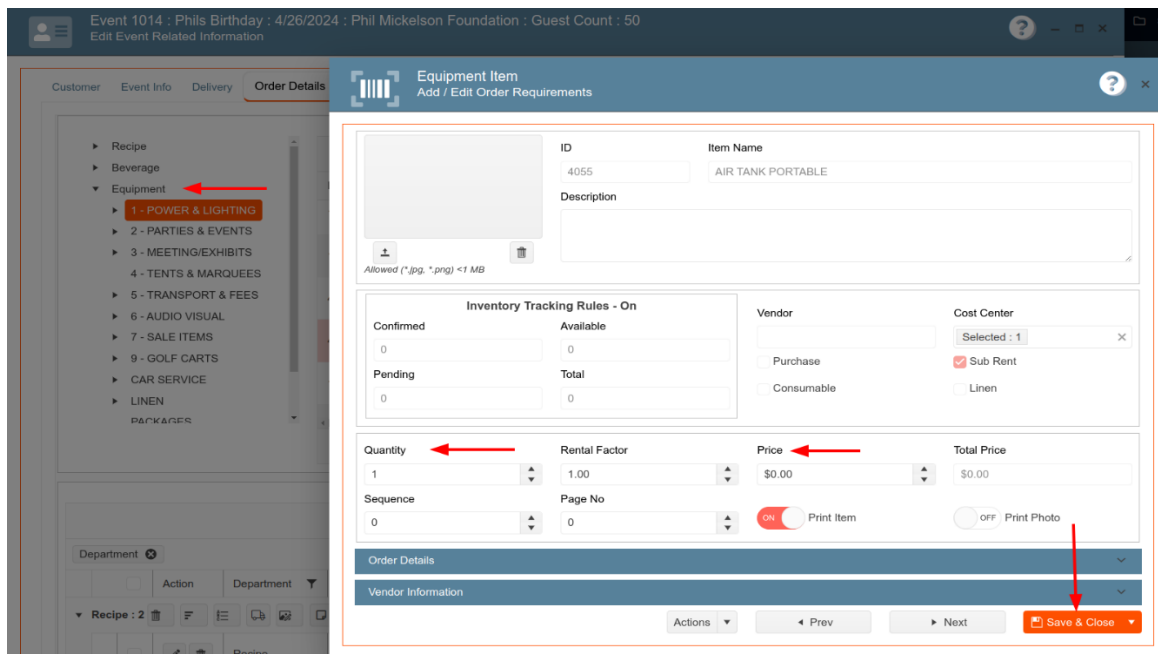
Guests: 6 Sequence: 0 Unit Price: \$10.00 Total Price: \$60.00

Equipment Item Options

Options

Save & Close

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



Equipment Item
Add / Edit Order Requirements

ID: 4055 Item Name: AIR TANK PORTABLE

Description:

Inventory Tracking Rules - On

| Confirmed | Available |
|-----------|-----------|
| 0 | 0 |
| Pending | Total |
| 0 | 0 |

Vendor: Purchase Sub Rent Consumable Linen

Cost Center: Selected: 1

Quantity: 1 Rental Factor: 1.00 Price: \$0.00 Total Price: \$0.00

Sequence: 0 Page No: 0 Print Item Print Photo

Order Details

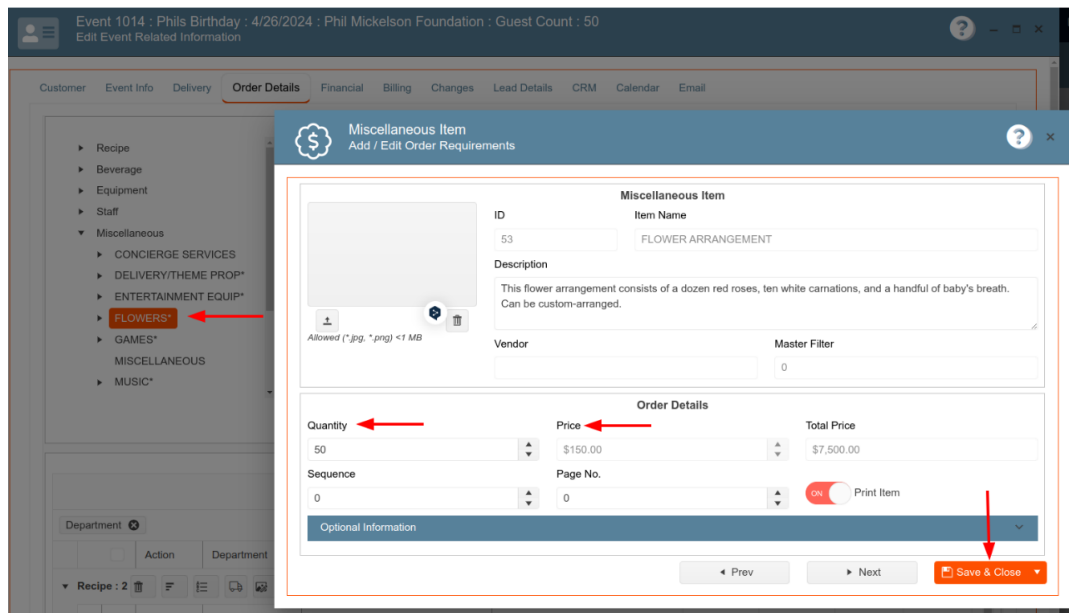
Vendor Information

Save & Close

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*

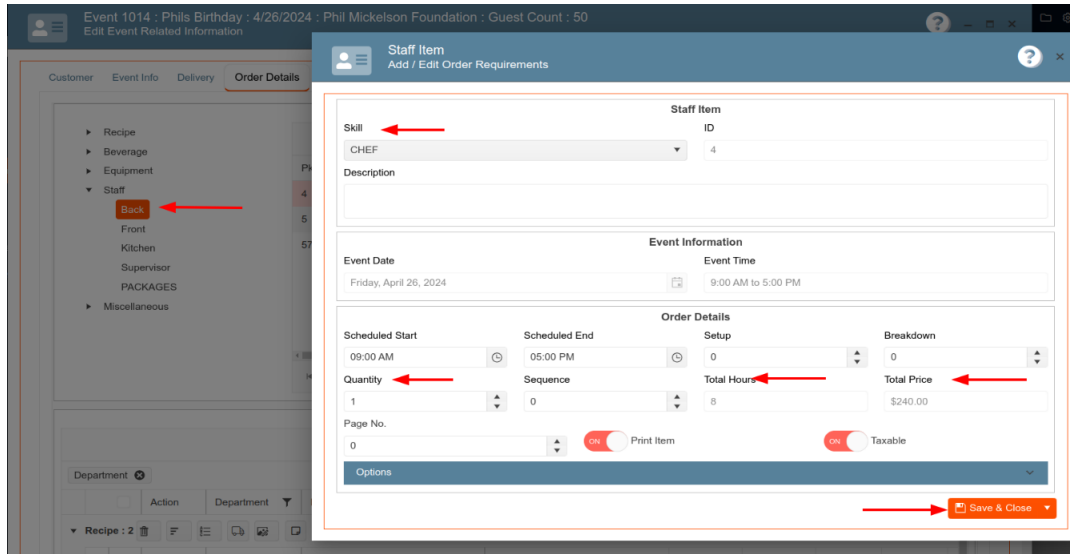


Requesting Staff in the *Staff* Department

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 ✕

| | Action | Revenue Code | Department | Item |
|--------------------------|---|--------------|------------|------|
| ▼ Equipment | | | | |
| <input type="checkbox"/> |  | Equipment | Equipment | |
| <input type="checkbox"/> |  | Equipment | Equipment | |
| 6 Guests | | | | |
| ▼ Menu | | | | |
| <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

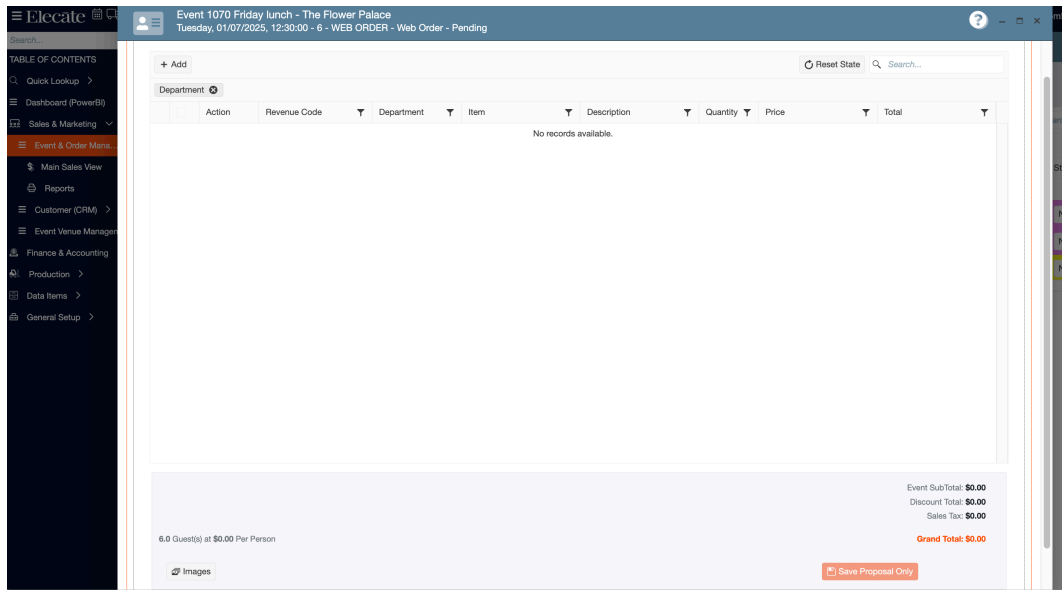
Customer Event Info Delivery Order Details **Proposal** Financial Billing Changes Lead Details CRM Calendar Email

+ Add Reset State

Department ✕

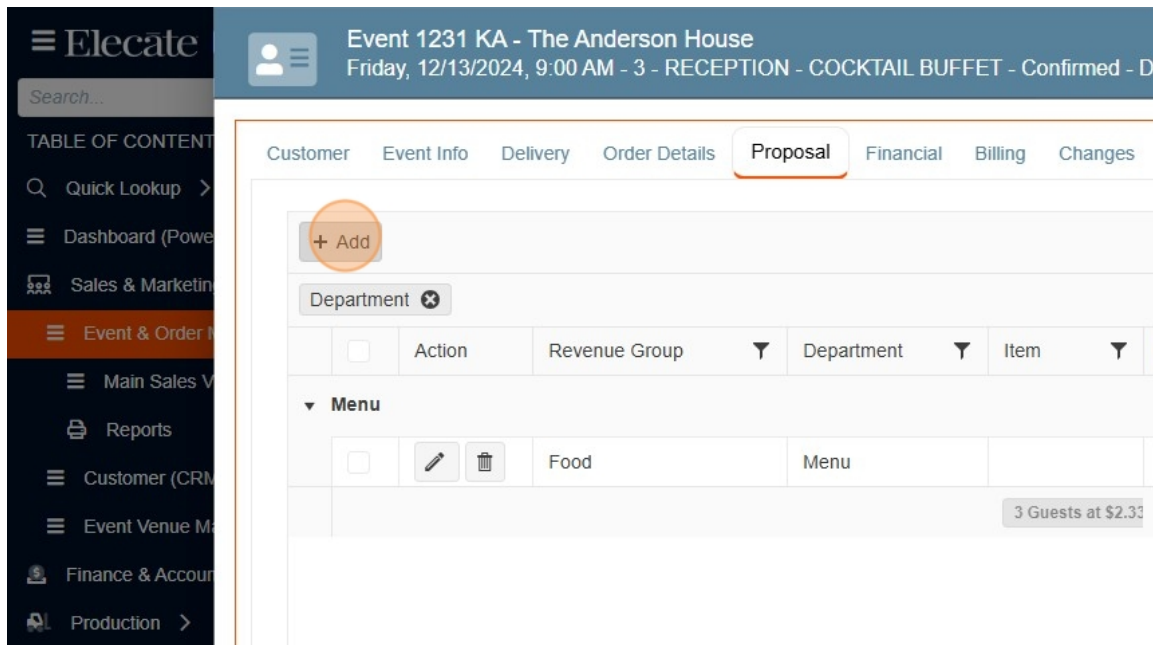
| | Action | Revenue Code | Department | Item | Description | Qu |
|-------------------------------|---|--------------|------------|---------------------|-------------|----|
| Equipment | | | | | | |
| <input type="checkbox"/> |  | Equipment | Equipment | Equipment for Se... | | 1. |
| <input type="checkbox"/> |  | Equipment | Equipment | | | |
| Menu | | | | | | |
| <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.



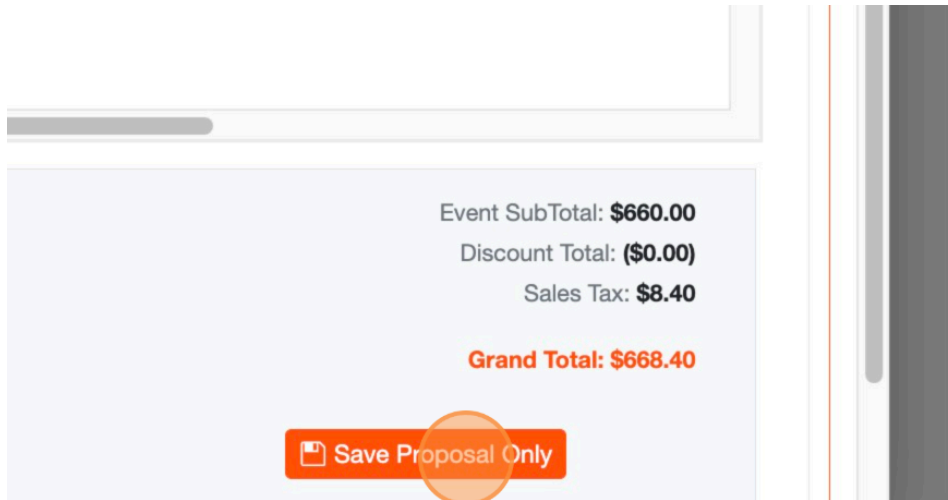
Users can now ADD items to generate on their *Proposal Tab* by following the below steps:

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



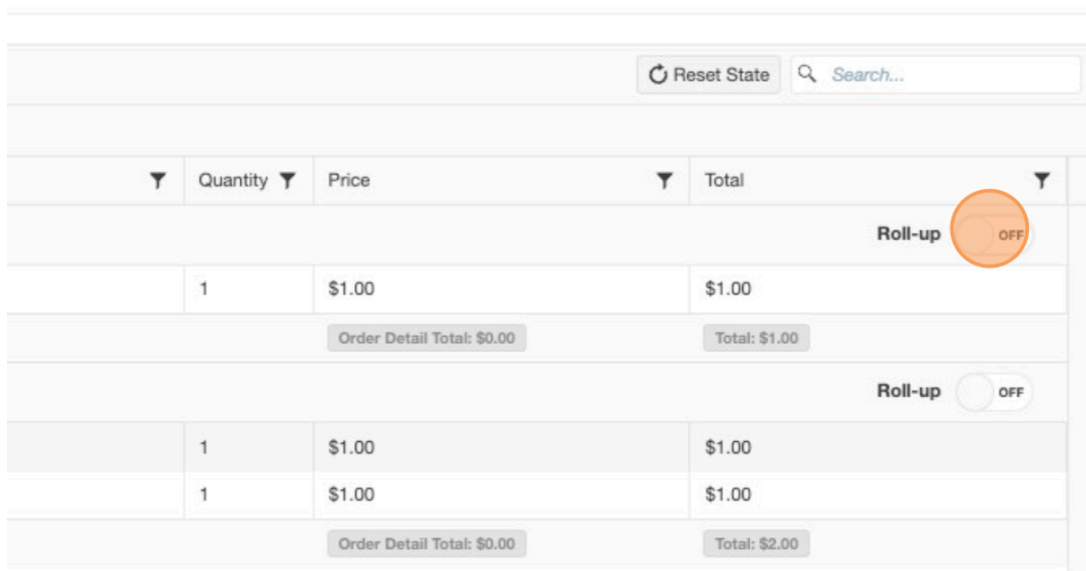
Event SubTotal: **\$660.00**
Discount Total: **(\$0.00)**
Sales Tax: **\$8.40**
Grand Total: \$668.40

 **Save Proposal Only**

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.

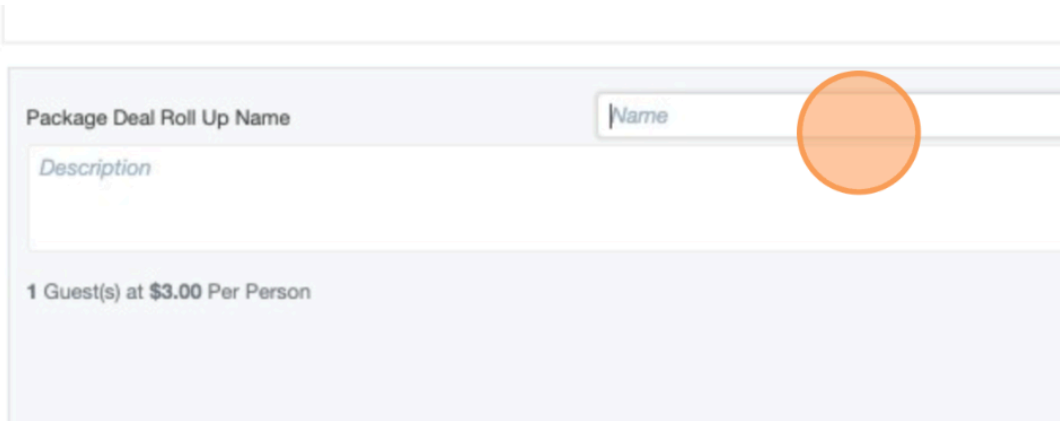
1. Once two or more revenue codes have been added to a proposal, the *Roll-up toggle* can be turned on.



Reset State Search...

| | Quantity | Price | Total |
|----------------------------|----------|---------------|--------|
| | 1 | \$1.00 | \$1.00 |
| Order Detail Total: \$0.00 | | Total: \$1.00 | |
| Roll-up OFF | | | |
| | 1 | \$1.00 | \$1.00 |
| | 1 | \$1.00 | \$1.00 |
| Order Detail Total: \$0.00 | | Total: \$2.00 | |
| Roll-up OFF | | | |

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*



Package Deal Roll Up Name

Description

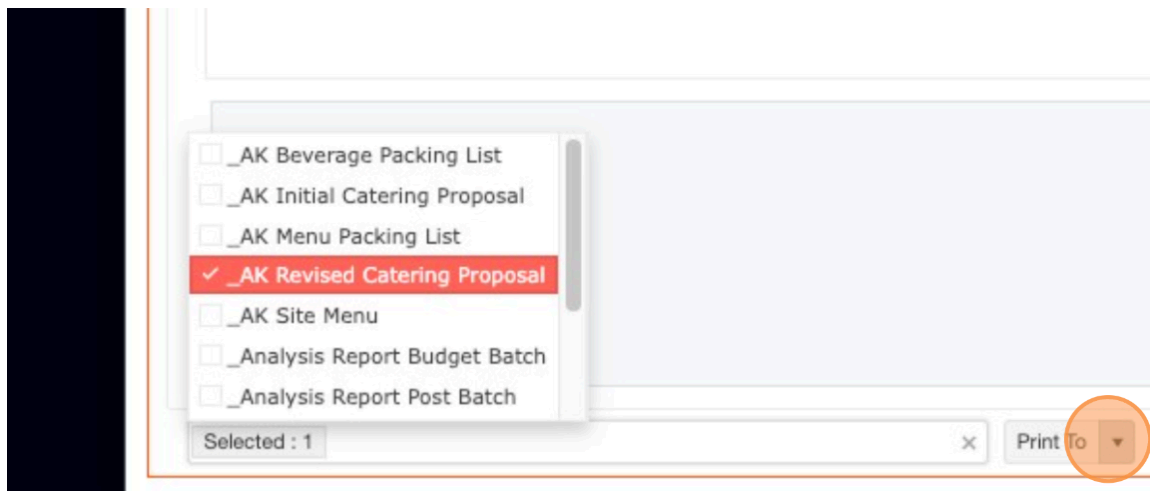
1 Guest(s) at \$3.00 Per Person

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



Selected : 1

Print To 

- ☐ _AK Beverage Packing List
- ☐ _AK Initial Catering Proposal
- ☐ _AK Menu Packing List
- ☒ _AK Revised Catering Proposal
- ☐ _AK Site Menu
- ☐ _Analysis Report Budget Batch
- ☐ _Analysis Report Post Batch

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*.

New Email Message

To

nwilson@naturalhistory.si.edu

CC

BCC

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

Cancel

 Send



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.

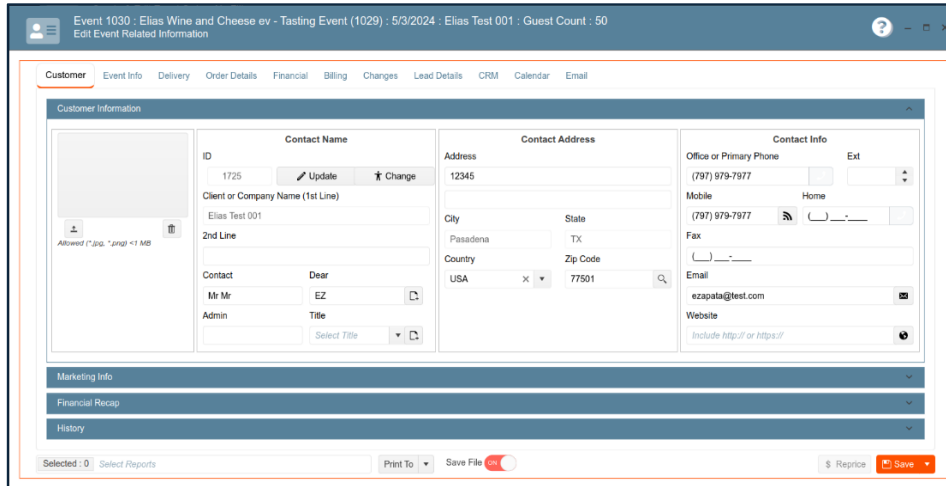
Additional detail in this section to be added.

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*

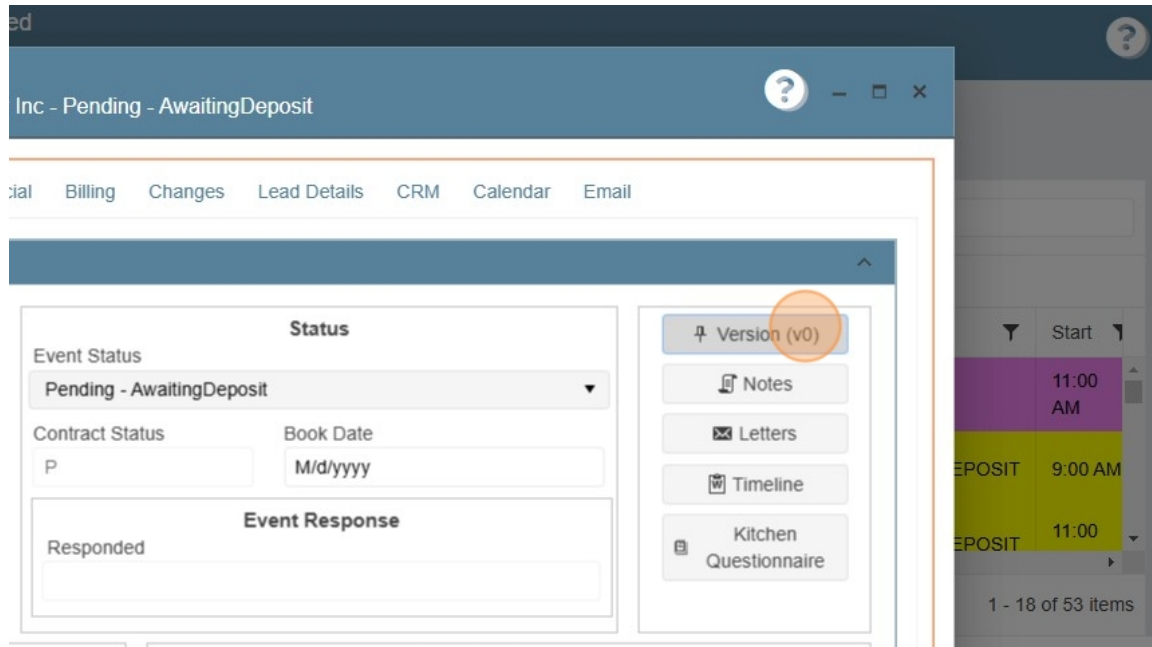


The screenshot displays the 'Customer' tab for 'Event 1030 : Elias Wine and Cheese ev - Tasting Event (1029) : 5/3/2024 : Elias Test 001 : Guest Count : 50'. The interface includes a top navigation bar with tabs: Customer, Event Info, Delivery, Order Details, Financial, Billing, Changes, Lead Details, CRM, Calendar, and Email. The main content area is divided into sections: Customer Information, Marketing Info, Financial Recap, and History. The Customer Information section contains fields for Contact Name (ID: 1725), Client or Company Name (Elias Test 001), 2nd Line, Contact (Mr Mr, Admin), Dear (EZ, Title), Address (12345, Pasadena, TX, USA, 77501), Contact Address, Contact Info (Office or Primary Phone: (797) 979-7977, Mobile: (797) 979-7977, Fax, Email: ezapata@test.com, Website), and a 'Save' button. The bottom status bar shows 'Selected : 0', 'Select Reports', 'Print To', 'Save File', 'Reprice', and 'Save'.

Creating Versions

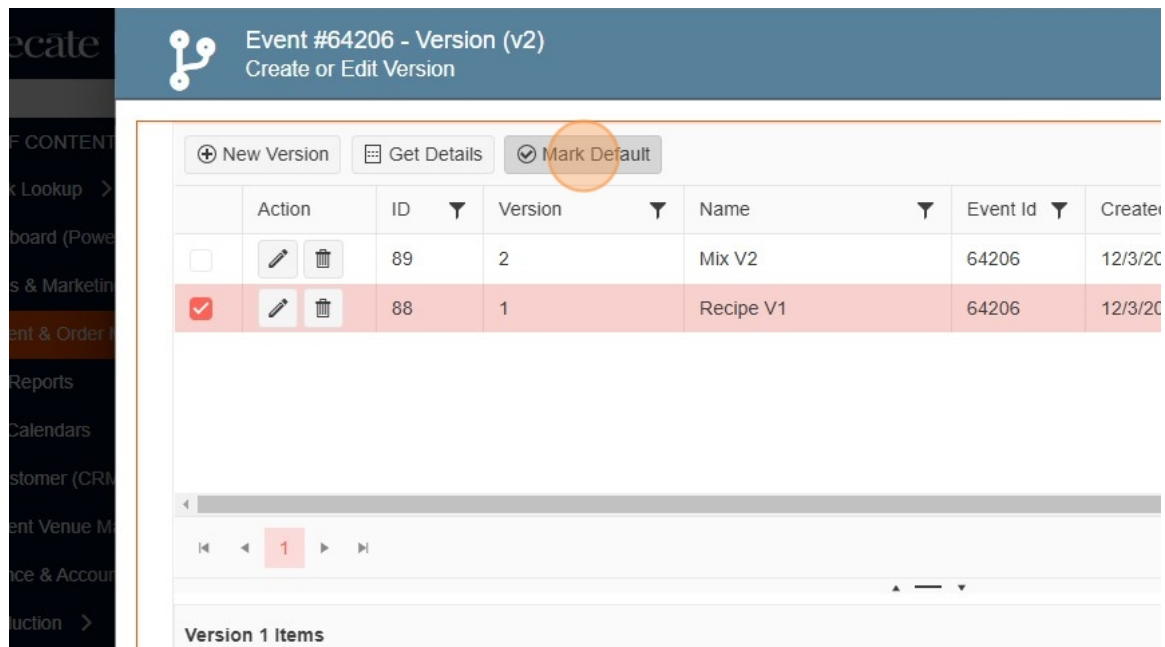
As events are always changing, you can create versions of event orders to revert to or reference.

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

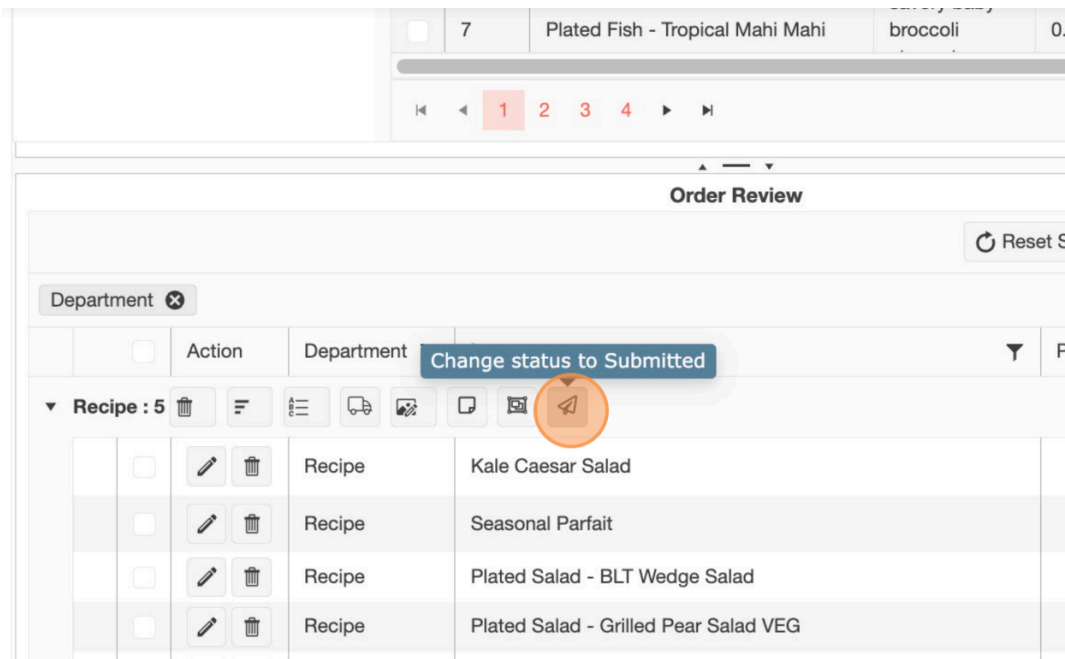


Submitting Orders

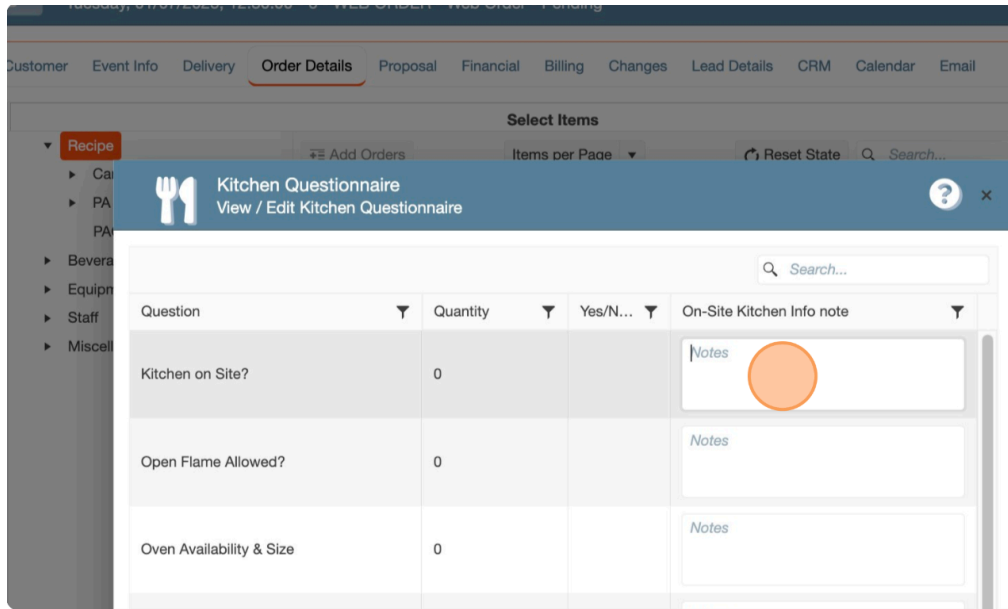
When the Sales department has finished their order for each department, they need to submit that order. The submission process tells the other departments (Kitchen, Operations, and Staffing) that they can begin filling the order. This process prevents Sales from making additional changes. Below is the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

Submitting Recipes

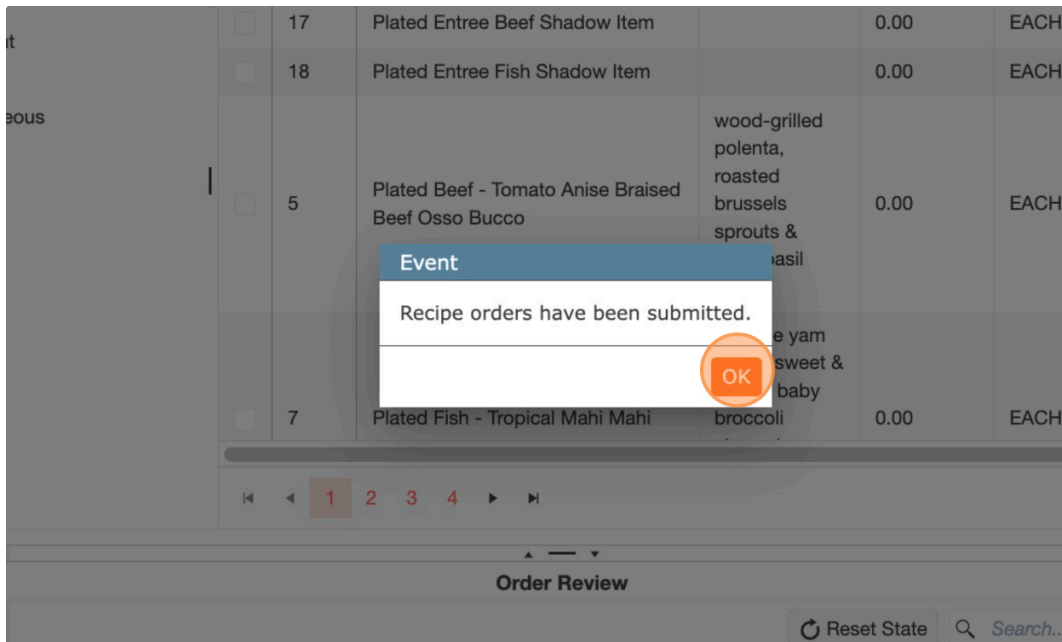
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*
3. Click on *Main Sales View Window*
4. Choose an event or click the pencil icon
5. Navigate to the *Order Details tab*
6. Scroll down to the *Order Review Section*
7. Click on the triangle 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.



10. 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

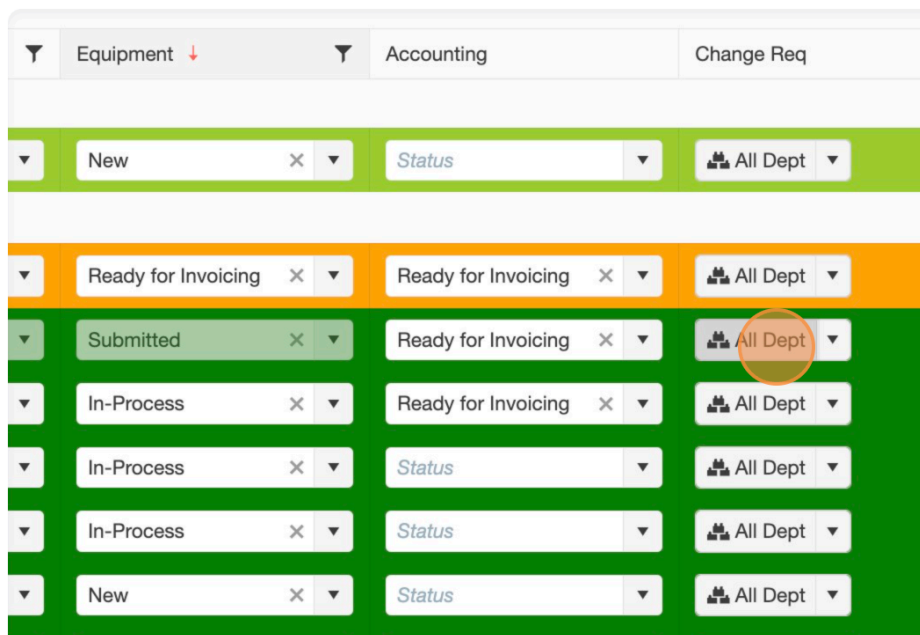
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*
3. Click on *Main Sales View Window*
4. Choose an event or click the pencil icon
5. Navigate to the *Order Details* tab
6. Scroll down to the *Order Review* Section
7. Click on the triangle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

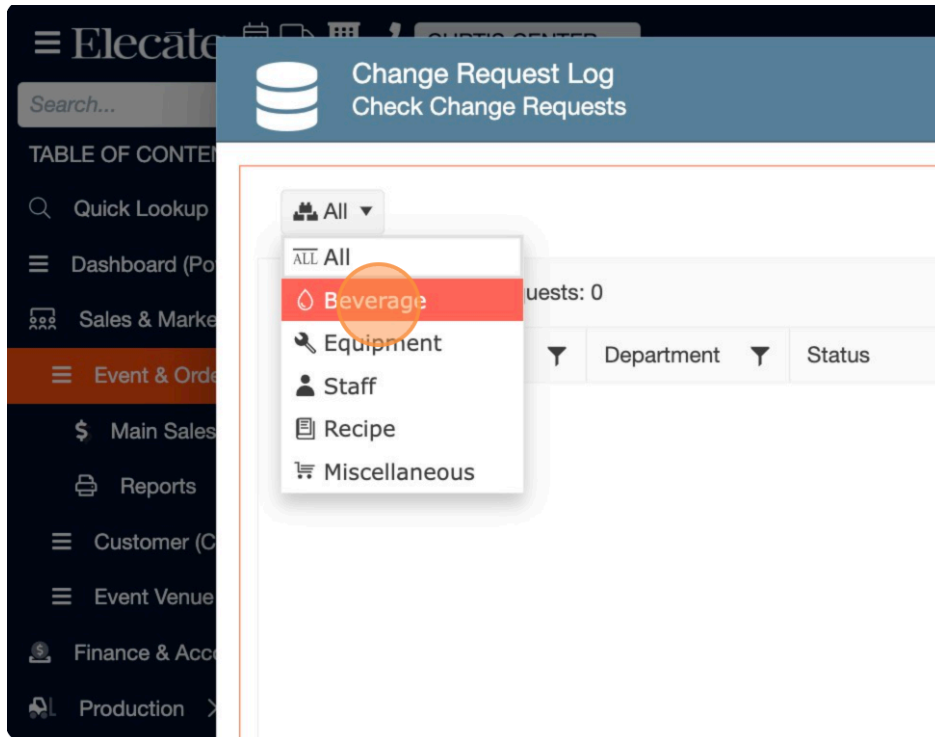
After a Sales User has submitted their order to a department, they are unable to make changes to that order using Order Details, Menu Builder, etc. Instead, they must follow one of the below processes to submit a change:

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).

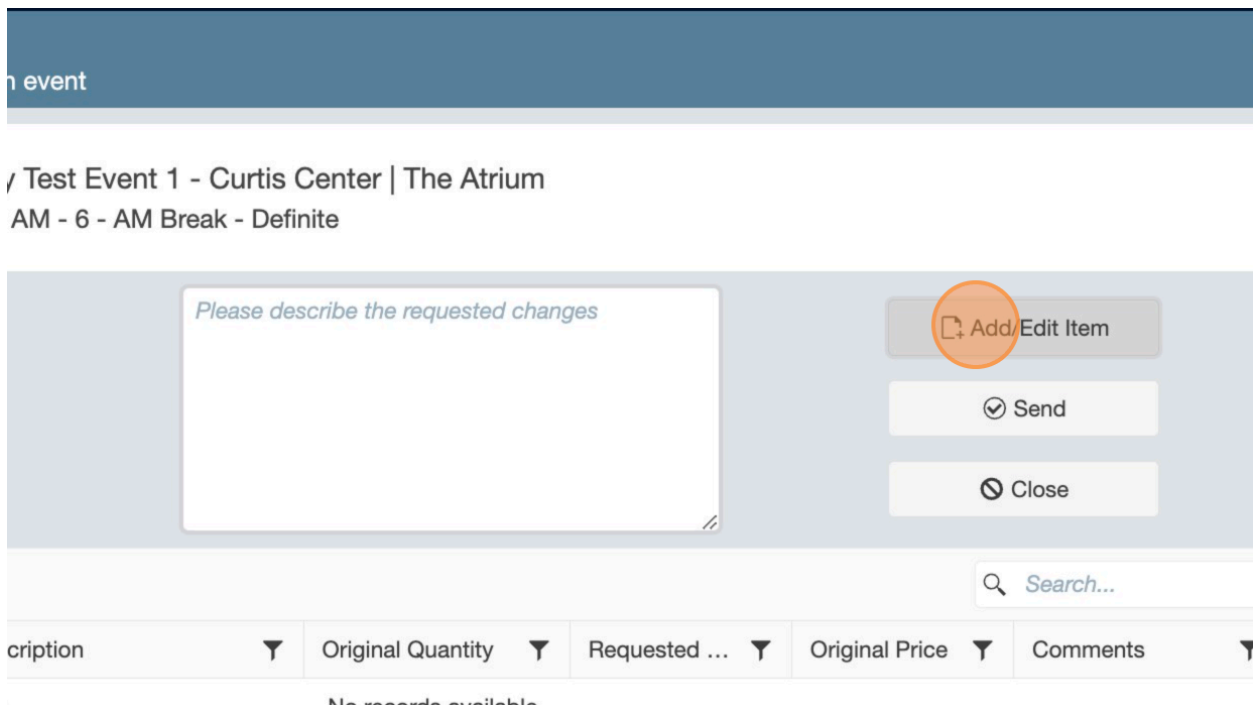


The screenshot shows a web interface with a table of orders. At the top, there are tabs for 'Equipment', 'Accounting', and 'Change Req'. Below the tabs, there are filters for 'New', 'Status', and 'All Dept'. The table has several rows, each with a status filter (e.g., 'Ready for Invoicing', 'Submitted', 'In-Process') and a department selection button (e.g., 'All Dept'). The 'All Dept' button in the second row is circled in orange.

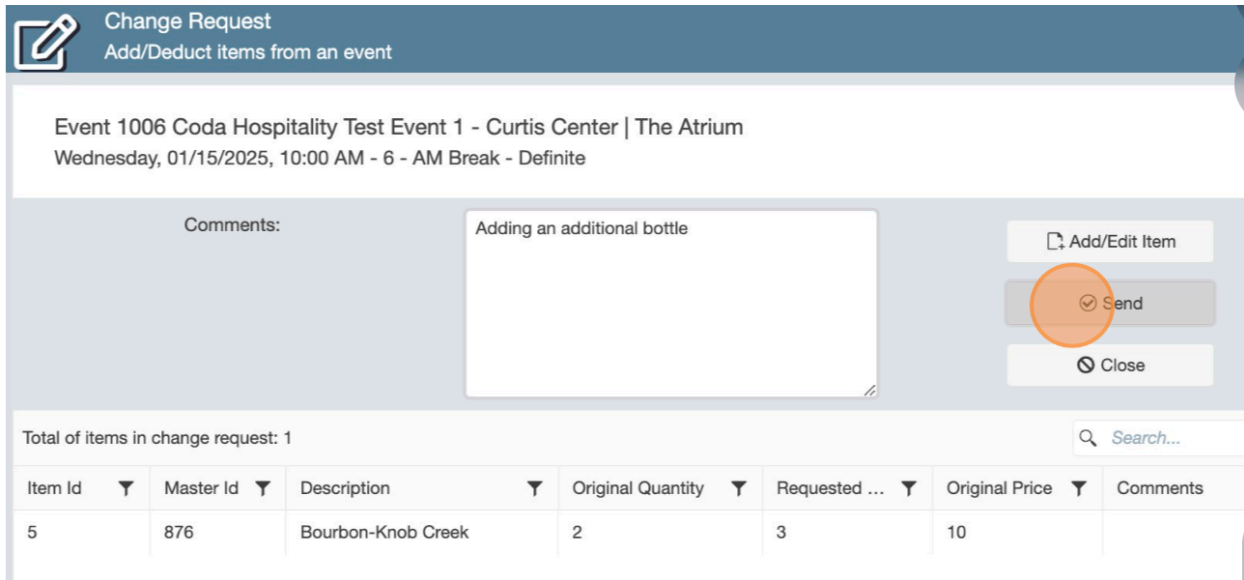
5. Navigate to the *All* button, and select the department from the drop down for which you need to submit a change



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

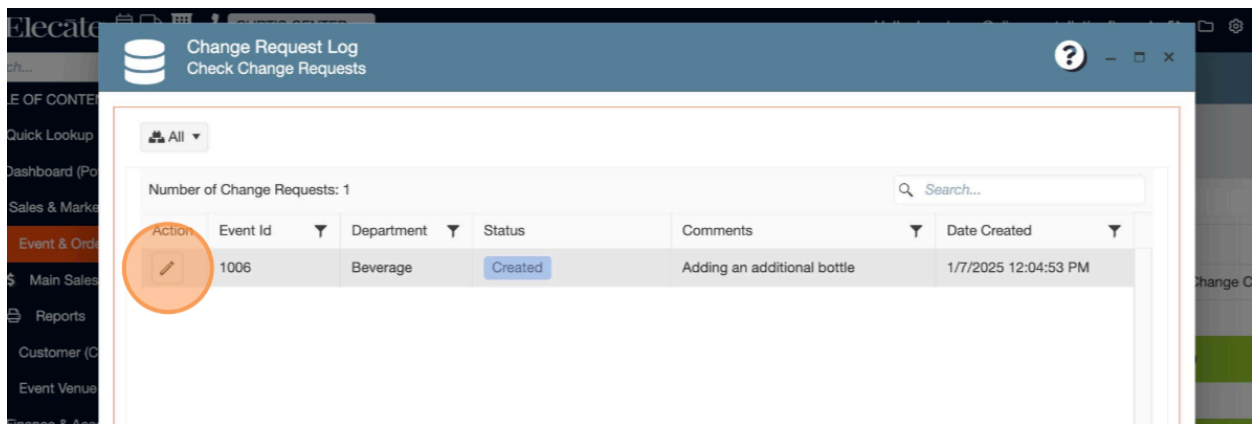



8. This will bring up the submitted order for that department, and allow users to edit quantities, etc.
9. Once the change has been made, close the order window. The *Change Request* screen will appear again, showing what was edited, as shown below



| Item Id | Master Id | Description | Original Quantity | Requested ... | Original Price | Comments |
|---------|-----------|--------------------|-------------------|---------------|----------------|----------|
| 5 | 876 | Bourbon-Knob Creek | 2 | 3 | 10 | |

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.

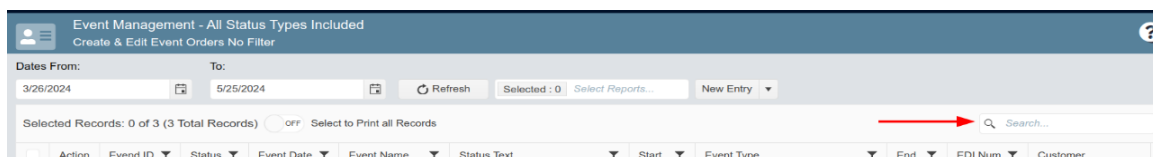


| Action | Event Id | Department | Status | Comments | Date Created |
|---|----------|------------|---------|-----------------------------|----------------------|
|  | 1006 | Beverage | Created | Adding an additional bottle | 1/7/2025 12:04:53 PM |

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.



| Action | Event ID | Status | Event Date | Event Name | Status Text | Start | Event Type | End | EDI Num | Customer |
|--------|----------|--------|------------|------------|-------------|-------|------------|-----|---------|----------|
|--------|----------|--------|------------|------------|-------------|-------|------------|-----|---------|----------|

2. Option Two

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



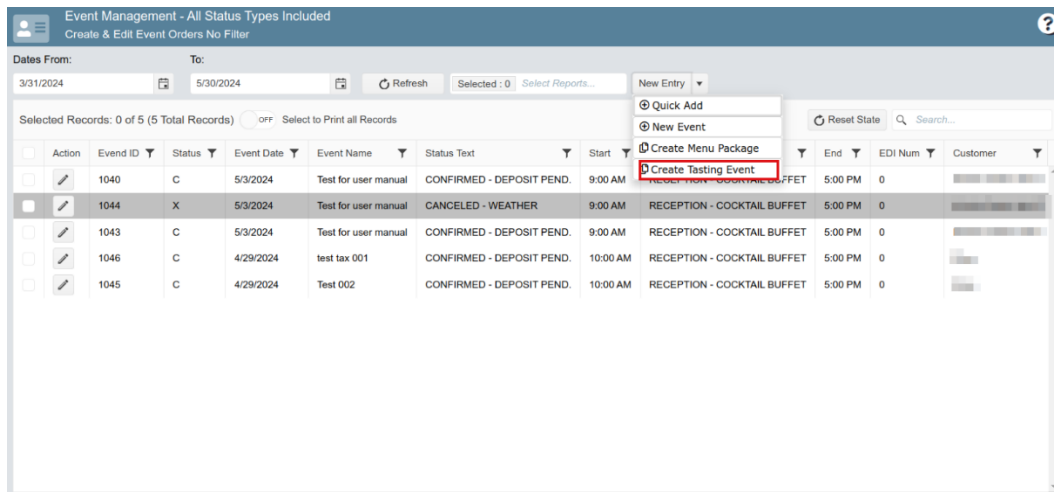
3. Option 3

- Click on the *Quick Lookup* link on the left-hand navigation panel
- 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:

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




- Pop-Up will appear
- 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


×

Customer Billing Information

Existing Customer

New Event Name

Existing Contact


New Customer

Existing Status

New Status

Existing Date

New Event Date



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
Edit Event Related Information

?

Customer

Event Info

Delivery

Order Details

Financial

Billing

Changes

Lead Details

CRM

Calendar

Email

Event Information

Event Date / Times

Date
5/3/2024
Start
09:00 AM
End
05:00 PM
Total
1
Adults
1
Children
0

Guests

Details

Event Status

Canceled - Too Expensive
Add Missing Items/Adjsmts
Call Today
Canceled - Competition
Canceled - Too Expensive
Canceled - Weather
Confirmed - Deposit Pend.
Confirmed - Deposit Rcv'd

Revision

0.0
Notes
Letters
Timeline
Site-Menu

Event Type

RECEPTION - COCKTAIL BUFFET

Event Name

Test for user manual

Series #

0

EDI #

0

Location & Seating

Type of Seating
Off Premise
Event Location
_Client Office

Event Files

History

Selected : 0

Select Reports

Print To

Save File ON

\$ Reprice

Save

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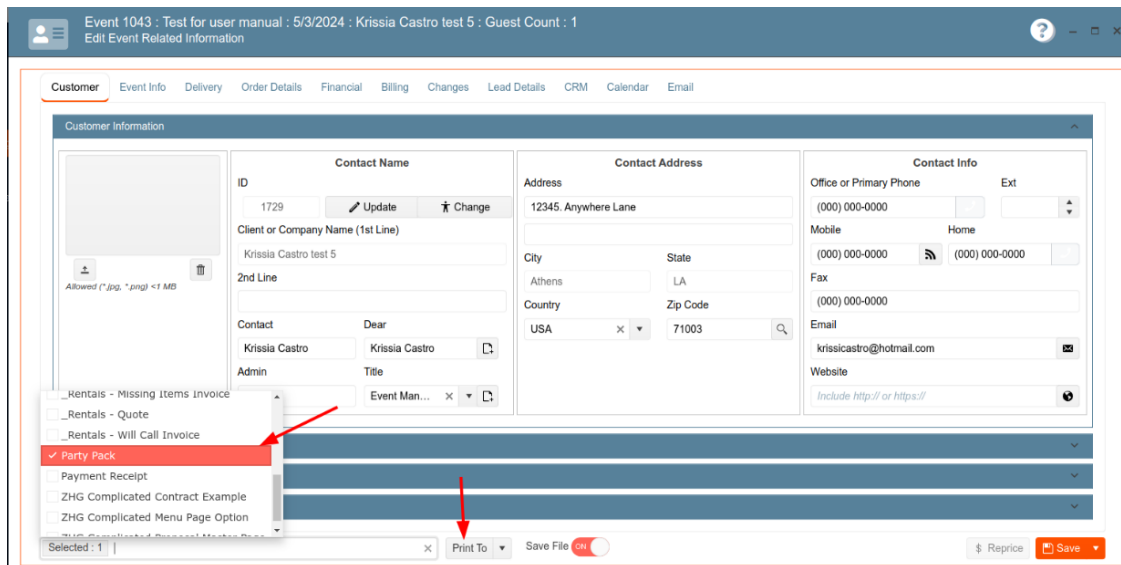
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Key Sales Documents and Reports

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.



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

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

Customer Information

Contact Name
ID: 1729 [Update] [Change]
Client or Company Name (1st Line): Krissia Castro test 5
2nd Line:
Contact: Krissia Castro, Dear: Krissia Castro, Admin: Event Man... [x] [v]
Title: [v]

Contact Address
Address: 12345, Anywhere Lane
City: Athens, State: LA
Country: USA, Zip Code: 71003

Contact Info
Office or Primary Phone: (000) 000-0000, Ext: [v]
Mobile: (000) 000-0000, Home: (000) 000-0000
Fax: (000) 000-0000
Email: krissiacastro@hotmail.com
Website: [Include http:// or https://]

Selected: 1 [x] [Print To] [Save File] [Reprice] [Save]

Dropdown menu options:
☐ _Rentals - Missing Items Invoice
☐ _Rentals - Quote
☐ _Rentals - Will Call Invoice
☒ Party Pack
☐ Payment Receipt
☐ ZHIG Complicated Contract Example
☐ ZHIG Complicated Menu Page Option

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) OFF Select to Print all Records

Reset State Search...

| ✓ | Action | Ev... | St... | Event... | Event... | Status ... | Co... | E... | Mobile P... | Cu... | Cost C... |
|---|--------|-------|-------|-----------|----------|---------------------------|-------|-----------|----------------|-------|-----------|
| ✓ | | 1038 | C | 5/1/2024 | Test003 | CONFIRMED - DEPOSIT PEND. | Mr Mr | | (354) 978-1351 | 1702 | CATERIN |
| ✓ | | 1028 | C | 5/1/2024 | Test 002 | CONFIRMED - DEPOSIT PEND. | Mr Mr | | (354) 978-1351 | 1702 | CATERIN |
| ✓ | | 1021 | C | 4/30/2024 | Test001 | CONFIRMED - DEPOSIT PEND. | Mr Mr | test03... | (515) 161-6161 | 1710 | CATERIN |

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

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

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Production



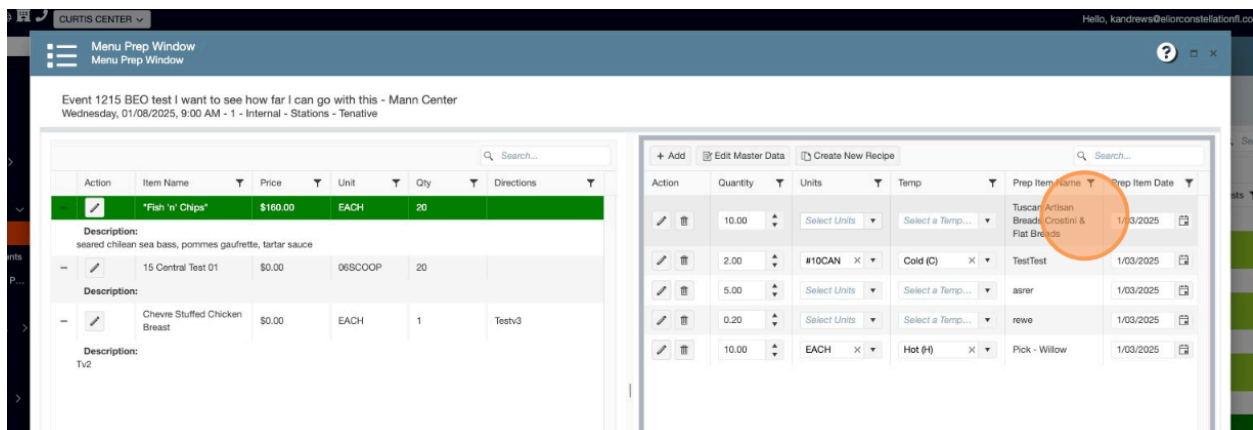
Elecate

Kitchen Management

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

Search...

| Qty | Directions |
|-----|------------|
| 20 | |
| 20 | |
| 1 | Testv3 |

+ Add
Edit Master Data
Create New Recipe

| 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)
?

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

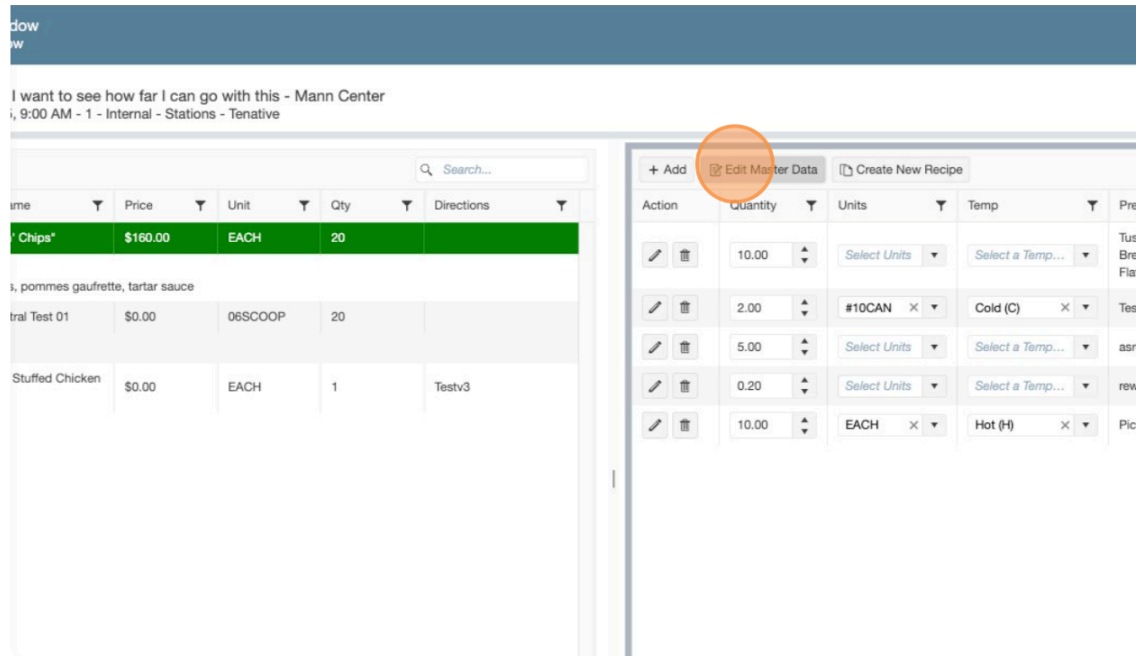
Scale
☐ on

Method of Prep

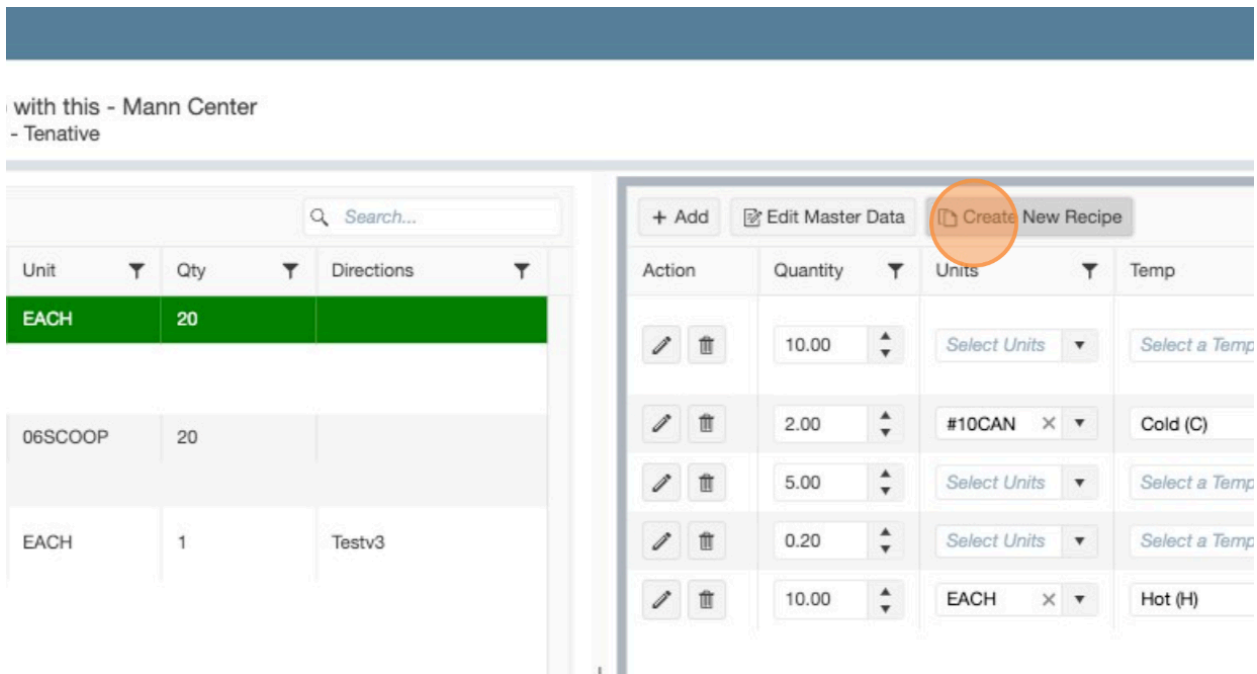
History

Close

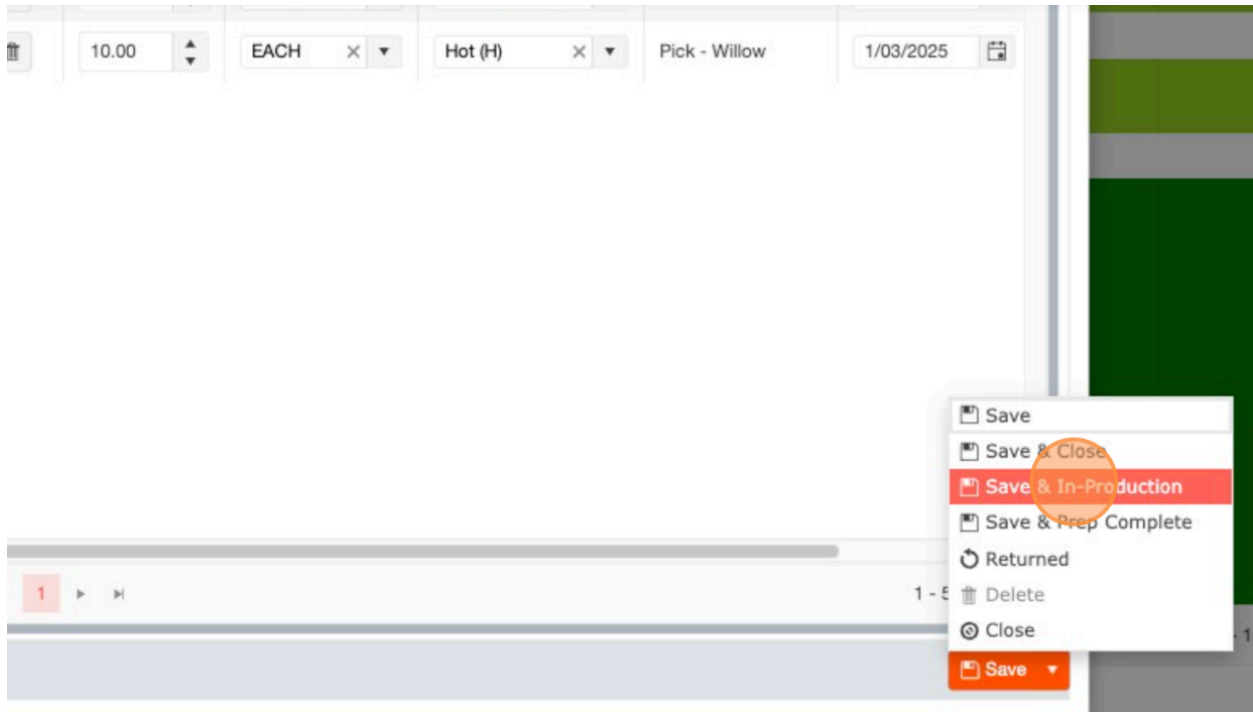
- In addition to event level edits, users can save their quantification changes to the master data item, by making the changes and then clicking *Edit Master Data*



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



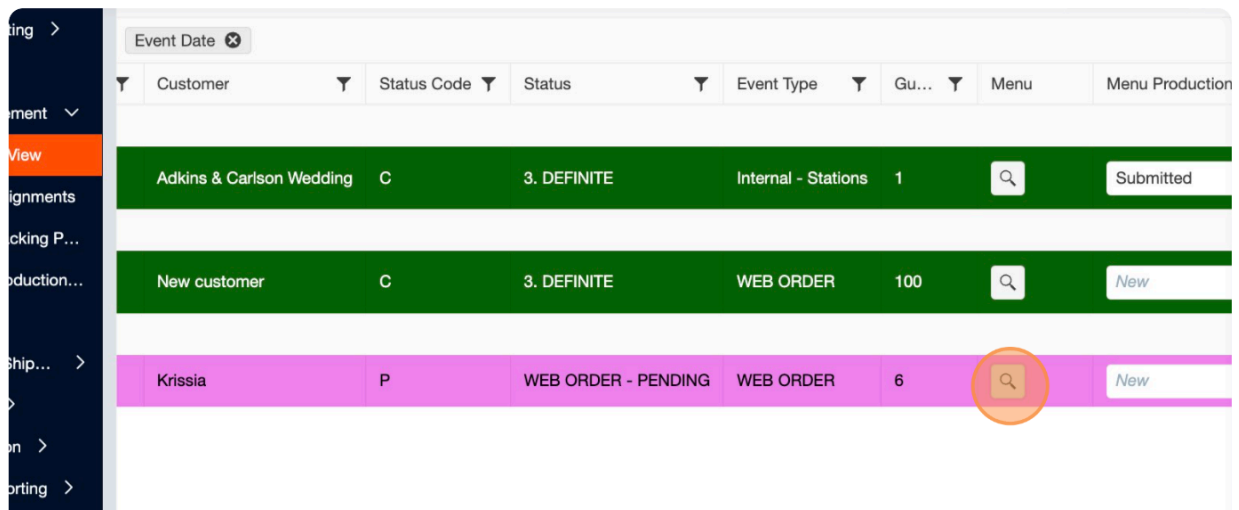
- To save progress while working on the Menu Prep Window, use the *Save & In-Production* option. This will let other users know that prep item adjustments are under way.
- When a user is finished updating an event, use the *Save & Prep Completed* option to indicate that the prep information is finished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

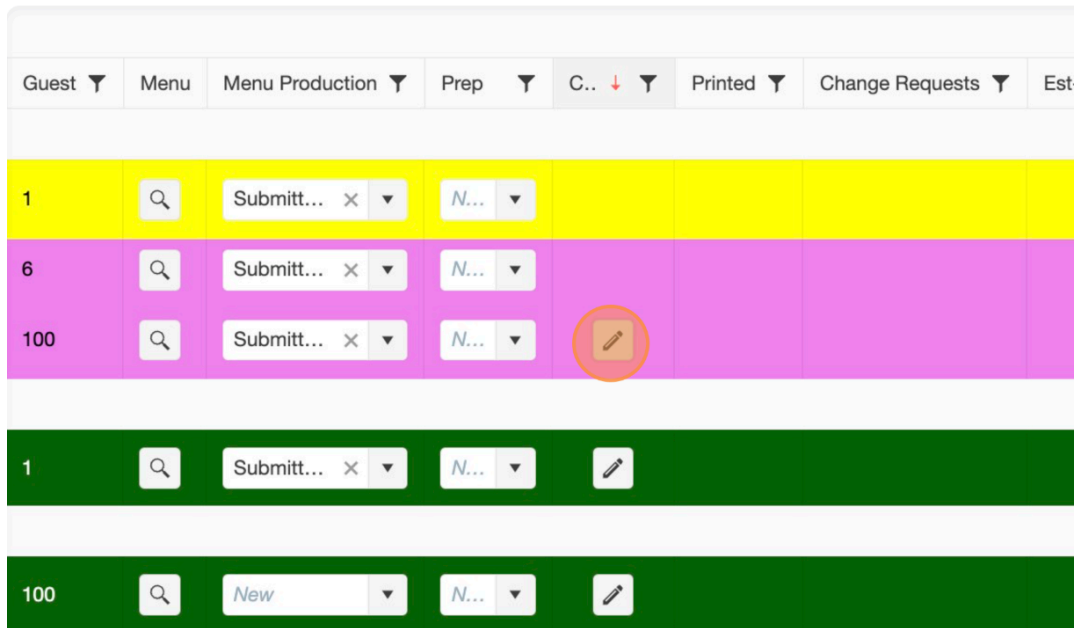
If a sales user needs to make more than one or two changes to their menu, they may ask the kitchen to put the order into Returned status. This will allow them to edit the order without completing multiple change requests. To do so, follow the below steps:

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

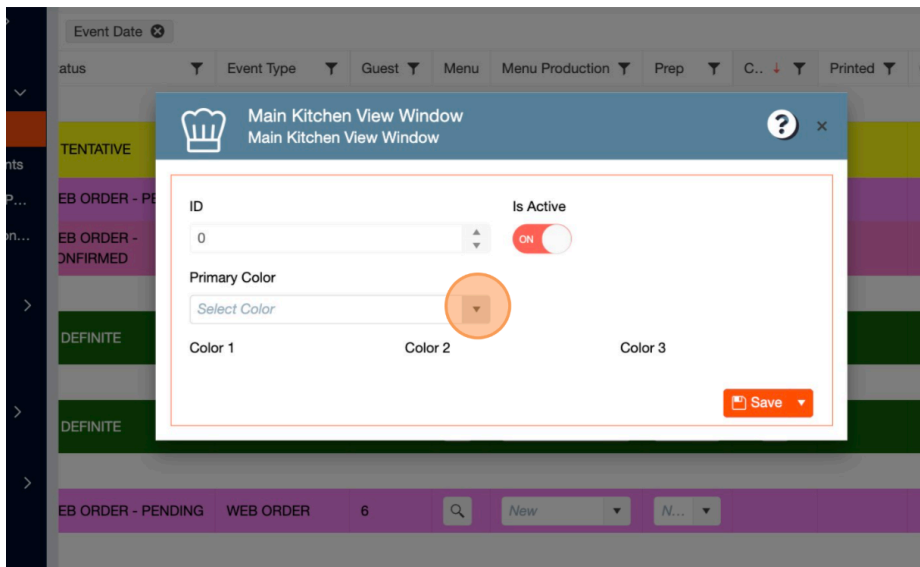
For businesses that use a visual, color code for their events, these colors can be assigned by following the below steps:

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.

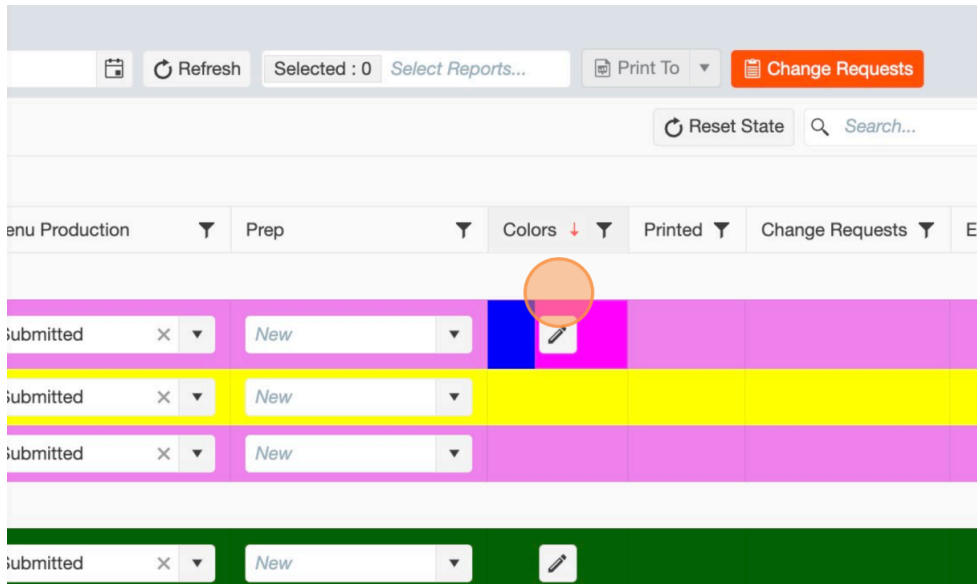


- Click the *Primary Color* drop down to select from the available color combinations, demonstrated as the first initials of the colors. Colors that are already in use within a given period of time will be grayed out so that they cannot be reused.

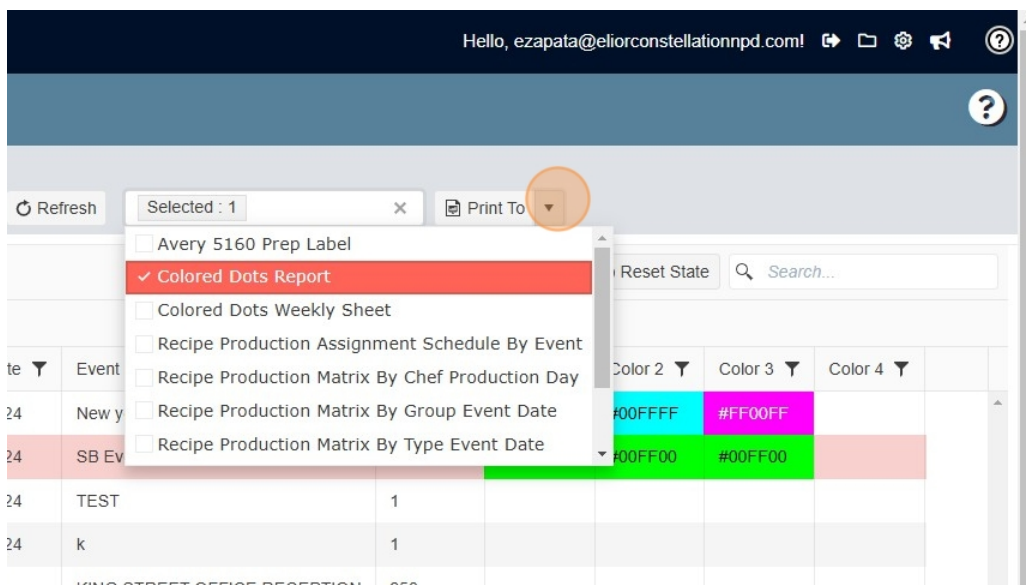
Tip: The rules for color combination re-use can be set via app settings.



- 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

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Management >

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up >

Today ◀ ▶

📅 December 2024

Day Week

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|--|--|-----------|--|--------|----------|
| 01 | 02 Total: 7 Scheduled: 6 Balance: 1 | 03 Total: 1 Scheduled: 1 Balance: 0 | 04 | 05 Total: 7 Scheduled: 4 Balance: 3 | 06 | 07 |
| 08 | 09 | 10 Total: 7 Scheduled: 0 Balance: 7 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |

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 & I

Data Items >

General Setup >

Batch Change

New

Select A Report...

Search...

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

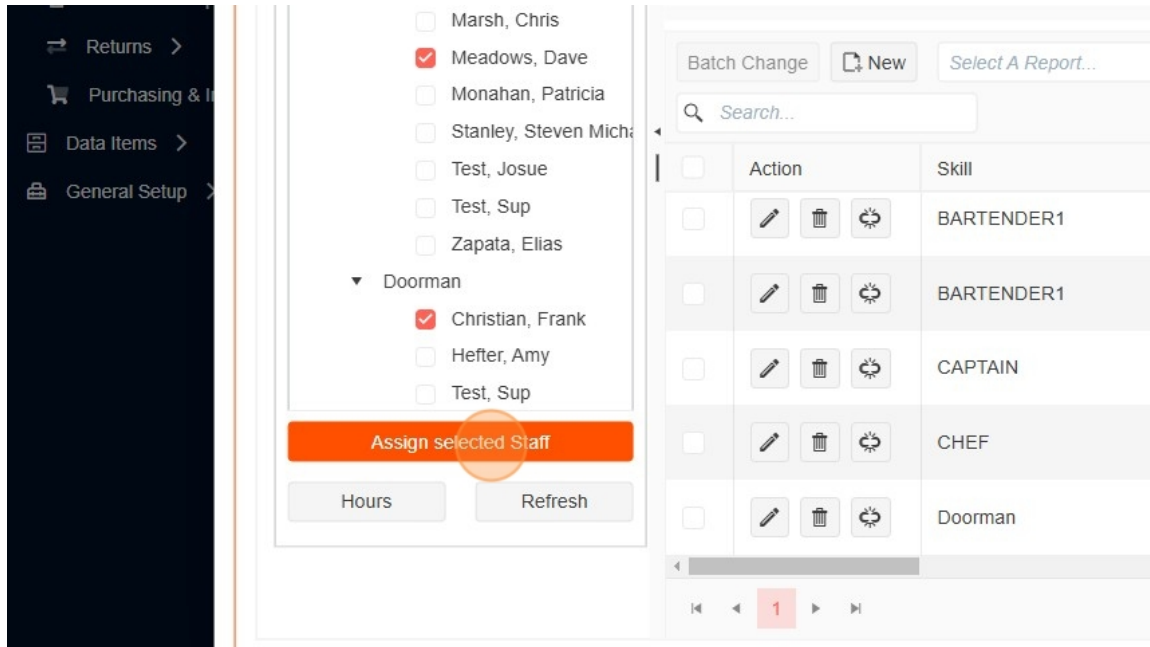
Assign selected Staff

Hours

Refresh

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

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



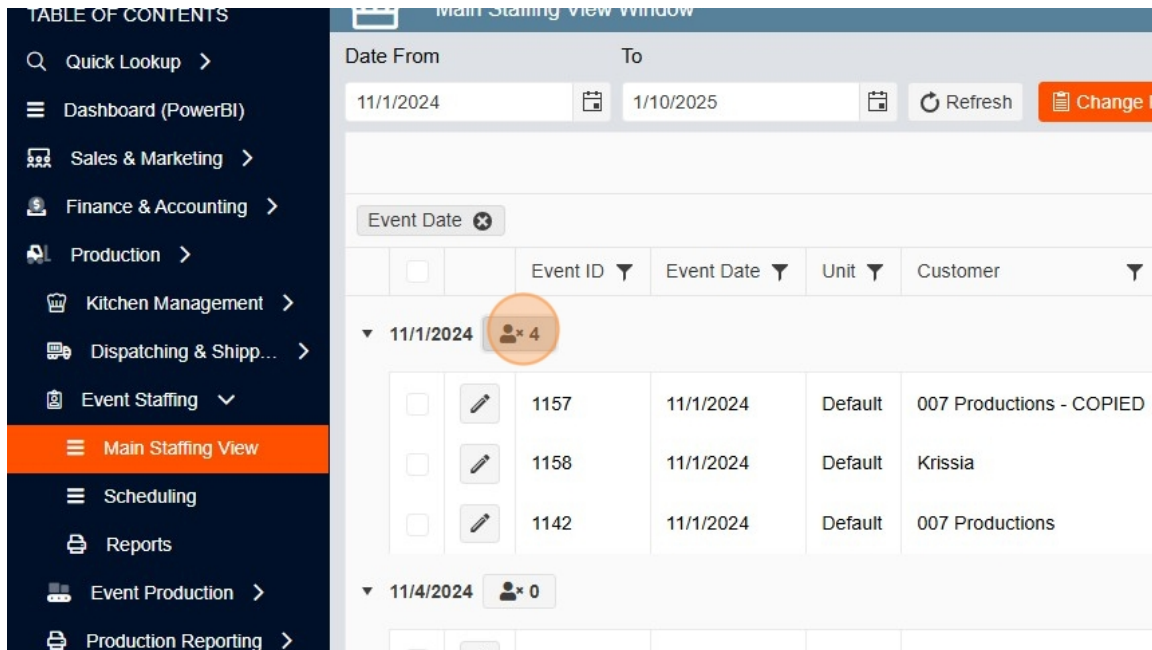
Event Worker Shift History

Add instructions on event worker shift history report

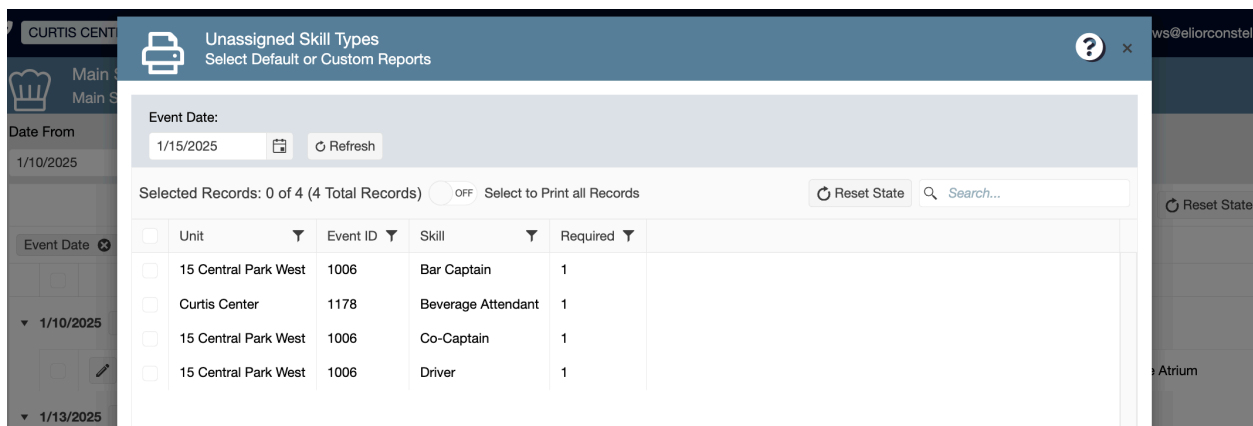
Quick Search Feature – Find Unfilled Positions

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

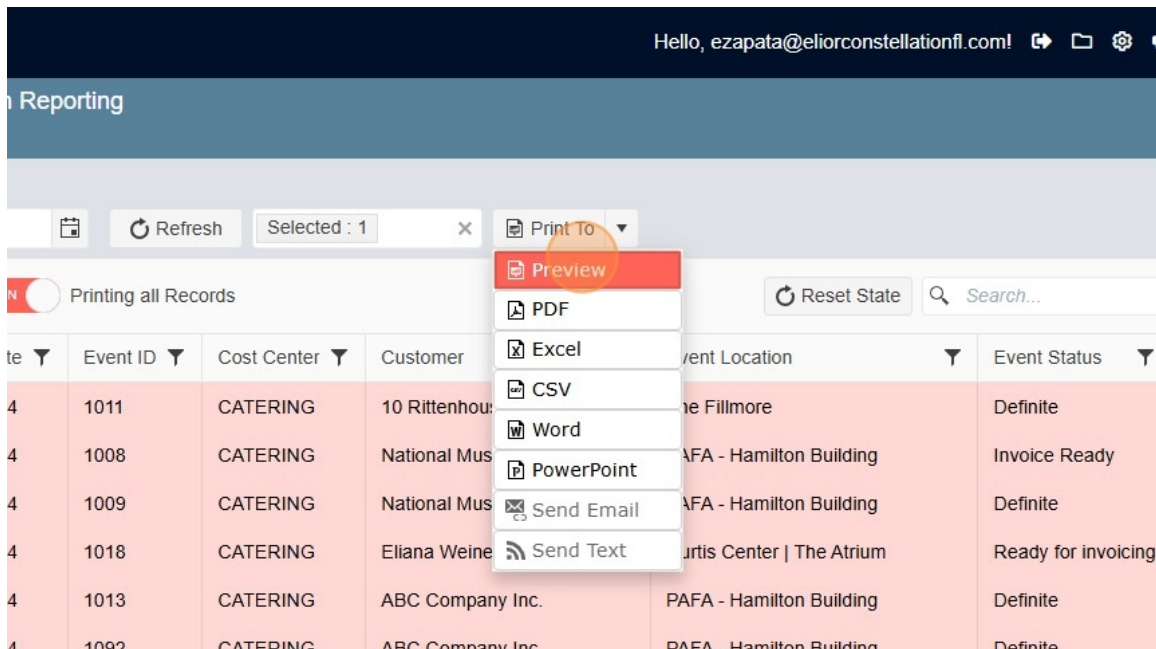
support03@elecate ▲

- Choose a rating for this skill
- 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:

To:

1/2/2023

5/25/2024

Refresh

Selected : 1

X

Selected Records: 0 of 2 (2 Total Records)

OFF

Select to Print all Records

Search...

| <input type="checkbox"/> | Equip ID | Item Name | Description | Quan... | Group | Equip Location | Event ID | Costcen... | Status | Event Date |
|--------------------------|----------|--|-------------|---------|------------------|----------------|----------|------------|--------|------------|
| <input type="checkbox"/> | 13030 | ANTIQUE GOLD IRIDESCENT SATIN 120" ROUND CLOTH | | 10 | IRIDESCENT SATIN | Warehouse | 1001 | CATERING | C | 12/25/2023 |
| <input type="checkbox"/> | 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

Preview

PDF

Excel

CSV

Word

PowerPoint

Send Email

Send Text

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

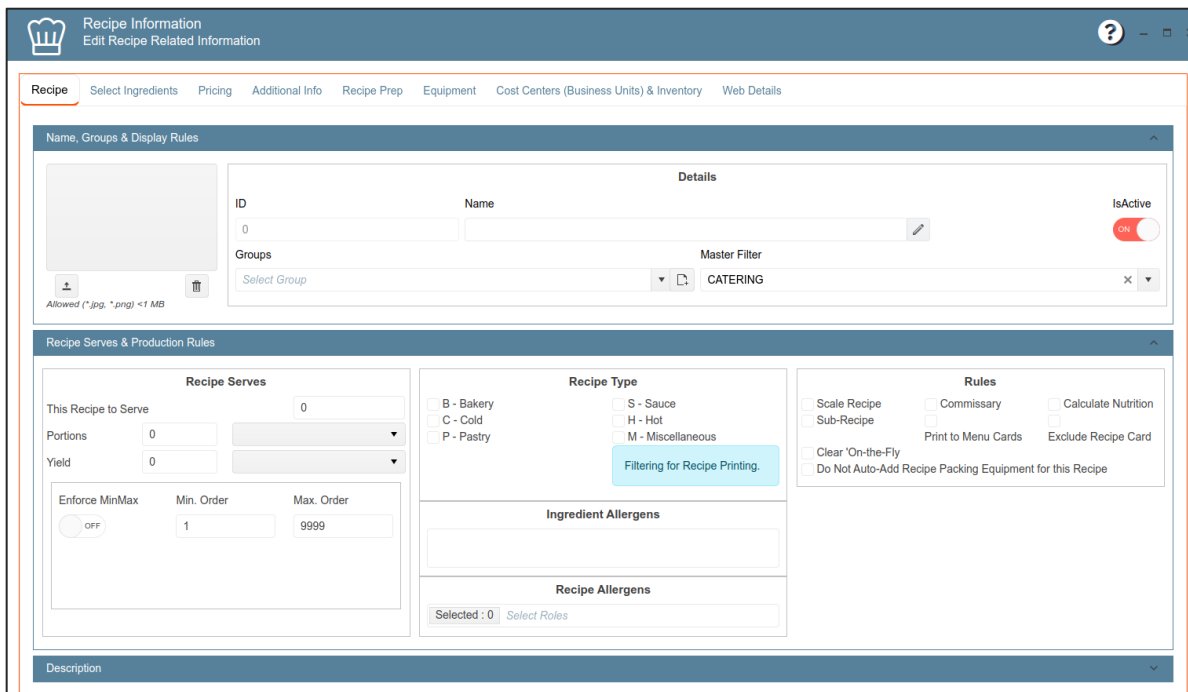
In the food management section, you can make changes to your recipes, ingredients, and menus.

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.

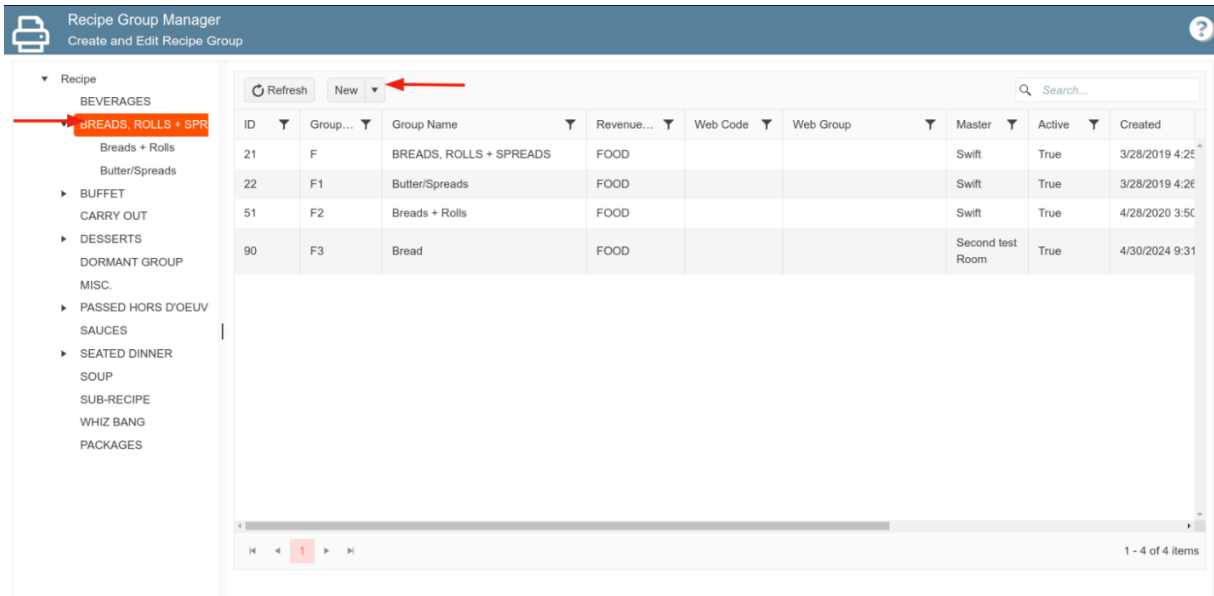


Adding Prep Items to Recipes

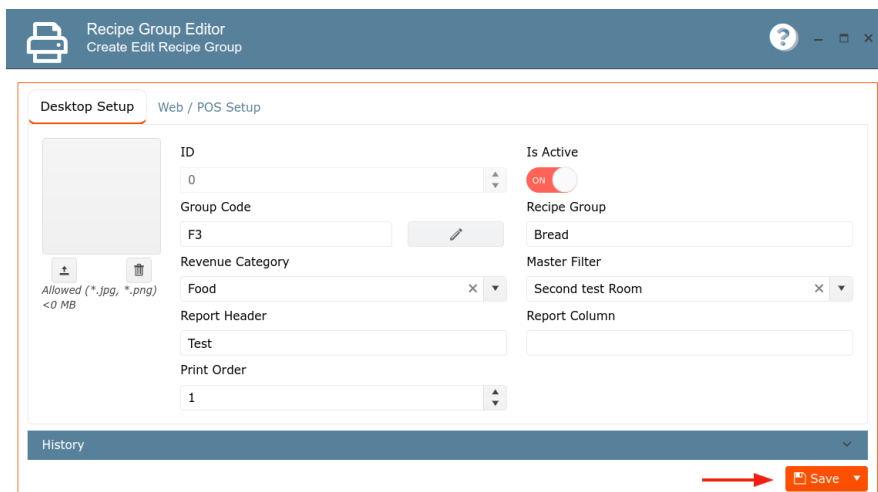
Details to come

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*



| ID | Group... | Group Name | Revenue... | Web Code | Web Group | Master | Active | Created |
|----|----------|-------------------------|------------|----------|-----------|------------------|--------|----------------|
| 21 | F | BREADS, ROLLS + SPREADS | FOOD | | | Swift | True | 3/28/2019 4:26 |
| 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 |



Desktop Setup Web / POS Setup

Allowed (*.jpg, *.png) <0 MB

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*

Recipe Item

ID: 0 Is Active: ON

Menu Name:

Event Type:

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

Master Filter: Ezq Cost Center

Revenue Code: Food

Menu Breakdown

Guests o

Number of Guests

Minimum Order Quantity

Financial Recap & Calculator

Total Price Per Guest Price

ID: 0 Is Active: ON

Menu Name:

Event Type:

Menu Group:

- SEEFOOD

Master Filter: Ezq Cost Center

Revenue Code: Food

Menu Breakdown

Guests o

Number of Guests

Web Enabled Item

Children's Menu

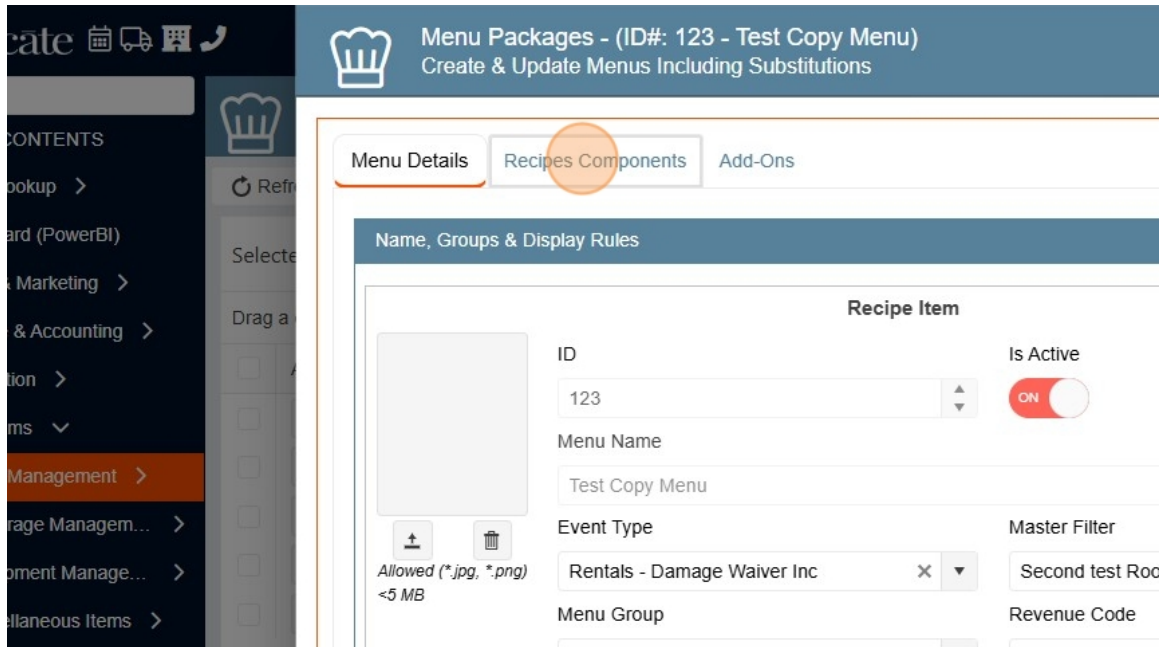
Cost Percent

Financial Recap & Calculator

Total Price Per Guest Price

Package \$0.00 \$0.00

Cost Percent .00 % .00 %



Menu Packages - (ID#: 123 - Test Copy Menu)
Create & Update Menus Including Substitutions

Menu Details Recipes Components Add-Ons

Name, Groups & Display Rules

Recipe Item

ID: 123

Menu Name: Test Copy Menu

Event Type: Rentals - Damage Waiver Inc

Is Active: ON

Master Filter: Second test Roc

Revenue Code


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

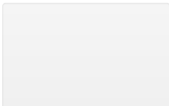
1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Ingredient Management (All Items)*
4. Click on the *New Entry* button
5. A pop-up window will appear
6. Name the ingredient*
7. Assign the group*
8. Once you enter all the required data click on *Save*.


Recipe Ingredient Information
Edit Recipe Ingredient Information

? - x

Recipe Ingredient & Price
Purchasing
Cost Centers (Business Units) & Inventory
Alt Units
Allergens

Name, Groups & Display Rules



Allowed ("*.jpg, *.png") <1 MB

Details

ID: 0
Name:
Is Active: ☒ ON

Groups: Select Group
Master Filter: CATERING
Scale Item: ☒ ON

Packing & Purchase Information


Cost Breakdown

History

Save

Setting Recipe Minimums and Maximums

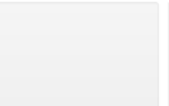
1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Recipe Management (All Items)*
4. Select the recipe you want
5. In the Recipe Serves part turn on the switch name *Enforce Minmax*
6. Set the Min Order and Max Order
7. Once you Made all the changes click on *Save*.


Recipe Information - (ID#: 430 - "Chorizo" Corn Dumplings Vegan / GF)
Edit Recipe Related Information

? - x

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

Name, Groups & Display Rules



Allowed ("*.jpg, *.png") <1 MB

Details

ID: 430
Name: "Chorizo" Corn Dumplings Vegan / GF
POS/EDI #: 8247
Is Active: ☒ ON

Groups: _imported
Master Filter: CATERING

Recipe Serves & Production Rules

Recipe Serves

This Recipe to Serve: 10.00
Portions: 0.00 EACH
Yield: 0.00

Enforce MinMax: ☒ ON
Min. Order: 10
Max. Order: 0

Recipe Type

B - Bakery
C - Cold
P - Pastry
S - Sauce
H - Hot
M - Miscellaneous

Filtering for Recipe Printing.

Rules

☒ Scale Recipe
☐ Commissary
☐ Calculate Nutrition
☐ Sub-Recipe
☐ Print to Menu Cards
☐ Exclude Recipe Card

Clear 'On-the-Fly
Do Not Auto-Add Recipe Packing Equipment for this Recipe

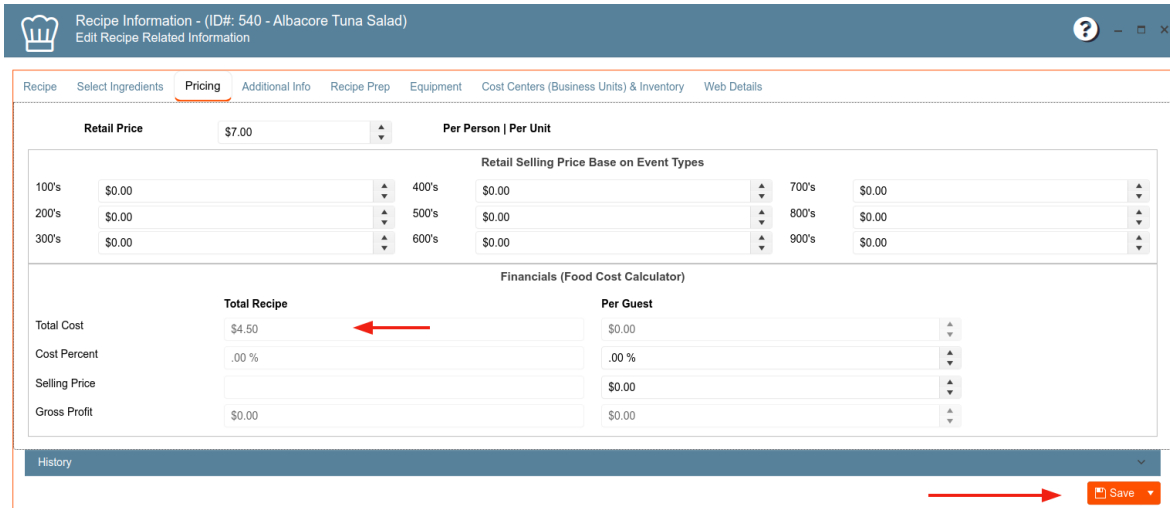
Ingredient Allergens

Recipe Allergens

Description

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



The screenshot shows the 'Recipe Information - (ID#: 540 - Albacore Tuna Salad)' interface. The 'Pricing' tab is active, displaying a 'Retail Price' of \$7.00 and a 'Per Person | Per Unit' section. Below this is a table for 'Retail Selling Price Base on Event Types' with columns for 100's, 200's, 300's, 400's, 500's, 600's, 700's, 800's, and 900's, all showing \$0.00. The 'Financials (Food Cost Calculator)' section is divided into 'Total Recipe' and 'Per Guest' columns. In the 'Total Recipe' column, the 'Total Cost' is \$4.50, 'Cost Percent' is .00 %, 'Selling Price' is empty, and 'Gross Profit' is \$0.00. In the 'Per Guest' column, 'Total Cost' is \$0.00, 'Cost Percent' is .00 %, 'Selling Price' is \$0.00, and 'Gross Profit' is \$0.00. A red arrow points to the 'Total Cost' field in the 'Total Recipe' column. At the bottom right, there is a 'Save' button with a red arrow pointing to it.

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 Management
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 | ON | \$0.05 |
| Cost Percent | .42 % | | .42 % |
| Selling Price | \$240.00 | | \$12.00 |
| Gross Profit | \$239.00 | | \$11.95 |

History

7. *Save and close*

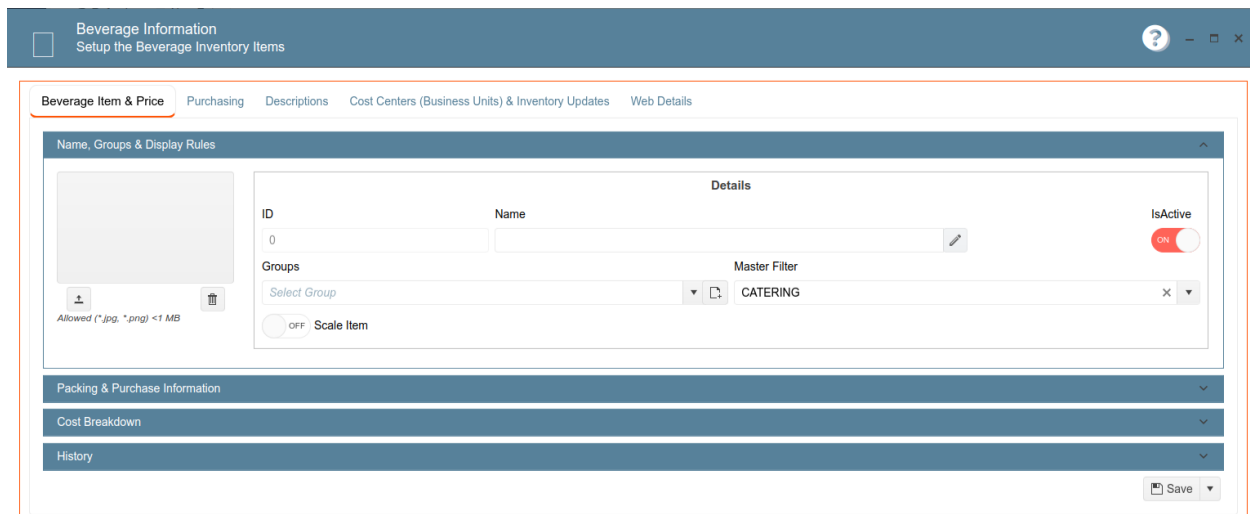
Beverage Management

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*.

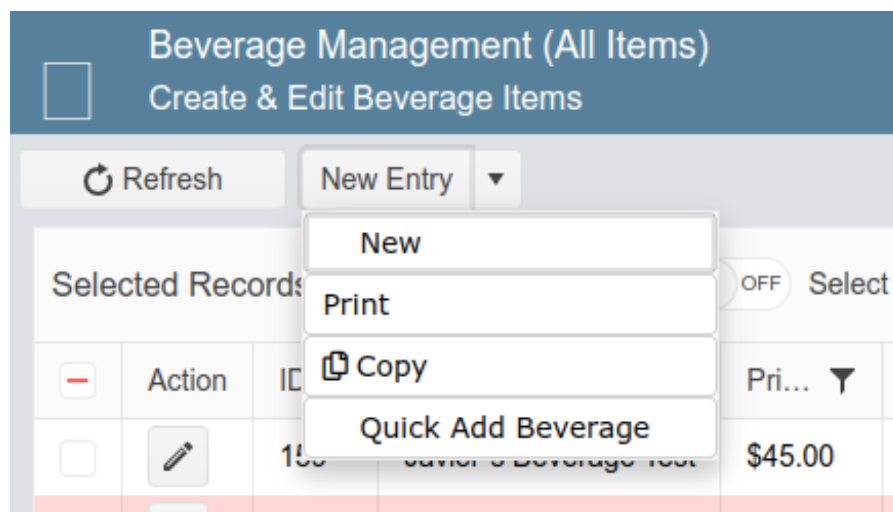
* All these fields are required to save changes successfully.

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 sections:

- Name, Groups & Display Rules:**
 - ID:** 0
 - Name:** (empty field)
 - IsActive:** ON (toggle switch)
 - Groups:** Select Group (dropdown menu)
 - Master Filter:** CATERING (dropdown menu)
 - Scale Item:** OFF (toggle switch)
- Packing & Purchase Information:** (collapsible section)
- Cost Breakdown:** (collapsible section)
- History:** (collapsible section)
- Save:** (button)



The screenshot shows the 'Beverage Management (All Items)' window with the following elements:

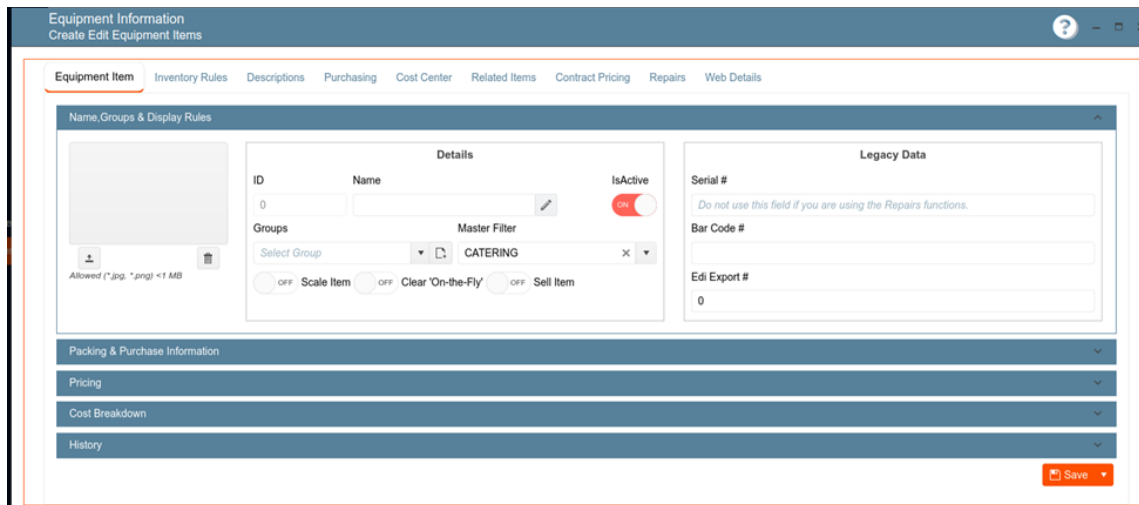
- Header:** Beverage Management (All Items), Create & Edit Beverage Items
- Buttons:** Refresh, New Entry (dropdown menu)
- Selected Records:** (table with columns: Action, ID, Name, Price)
- Dropdown Menu:** New, Print, Copy, Quick Add Beverage
- Table Data:**

| Action | ID | Name | Price |
|-------------|-----|--------------------------|---------|
| [Edit Icon] | 150 | CATERING & Beverage Item | \$45.00 |

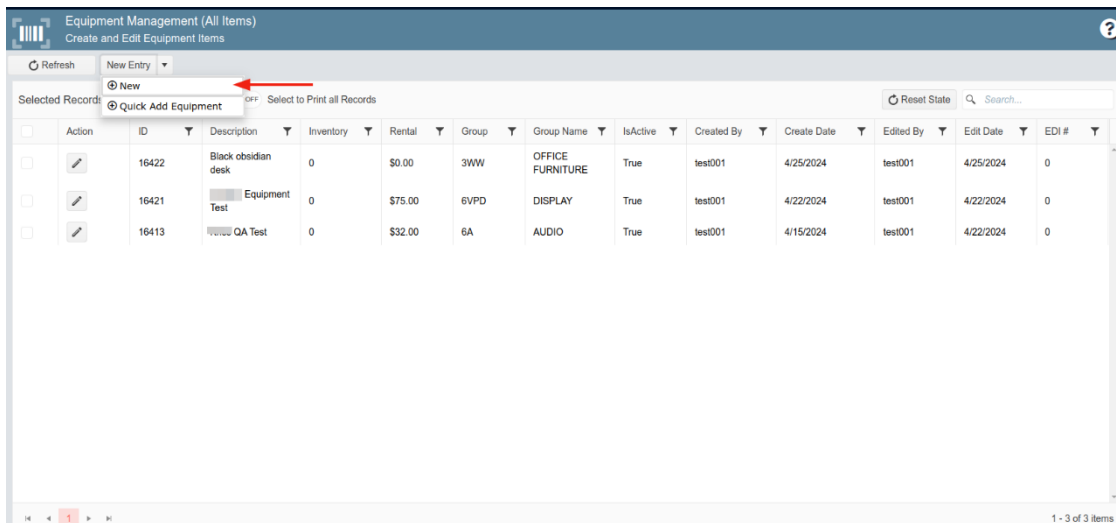
Equipment Management

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 | Is Active | 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


A screenshot of the "Miscellaneous Usage Reporting" web interface. The header bar is dark blue with a printer icon, the title "Miscellaneous Usage Reporting", the subtitle "Select Default or Custom Reports", and a help icon. Below the header, there's a light gray bar containing two date pickers (4/2/2024 and 6/1/2024), a "Refresh" button, and a "Selected : 1" dropdown. A dropdown menu is open, showing two options: "Miscellaneous Requirements By Event Date" (which is selected with a red background and a checkmark) and "Miscellaneous Staff Requirements By Event Date" (which is unselected).

HR Management

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

Adding a New Staff Member

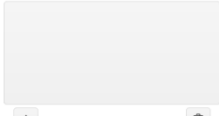
1. Click on *Data Items* in the side panel
3. Click on *HR Management*, then click on *HR Management (All Staff)*
4. Click on *New Entry* button
5. A pop-up window will appear
7. Fill in all the necessary information. Take into consideration that First Name, Last Name, Address, City, and State must be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



Staff Person Management
Create or Update Staff Profiles

? - □ ×

Contact Information
Profile
Skill Types
HR
Assignments
Responses
Security
Mobile/Web
Availability



Allowed (*.jpg, *.png) <1 MB

Staff ID

0

First

Middle

Last

Address

City

State

Country

USA

Zip Code

Phones, Email and Text

Office or Primary Phone

Ext

Mobile

Home

Fax

Email

Website

Status & Vendor Information

Work Status

Active

Vendor

Select Vendor (if any)...

History

Save

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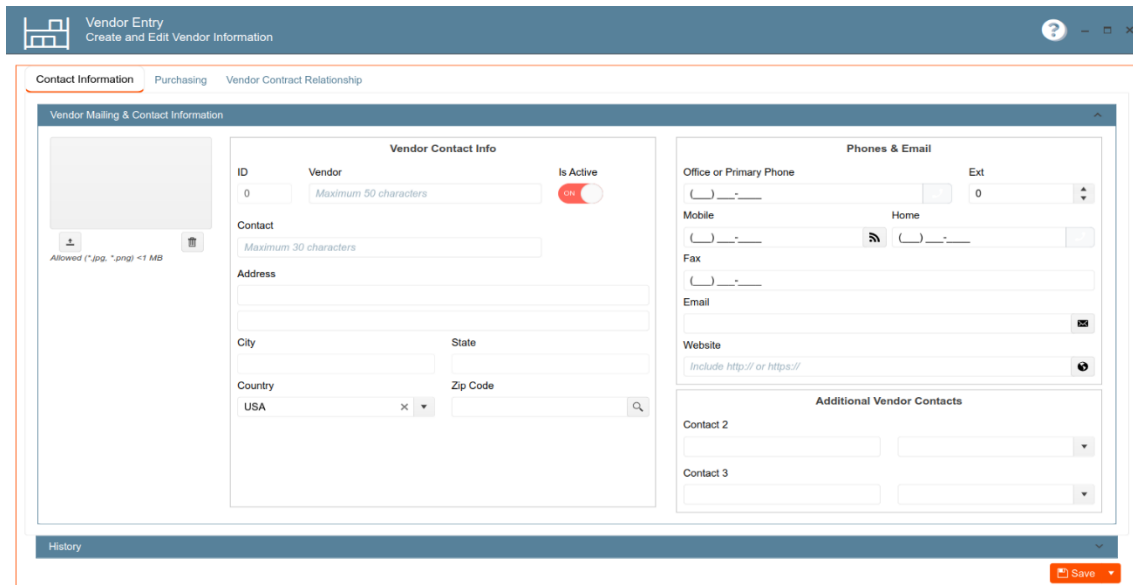
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Vendor Management

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 window has a dark blue header bar with a question mark icon and window controls. Below the header, there are three tabs: "Contact Information" (selected), "Purchasing", and "Vendor Contract Relationship". The main content area is titled "Vendor Mailing & Contact Information" and contains several form sections:

- Vendor Contact Info:** Includes fields for "ID" (with a value of 0), "Vendor" (with a placeholder "Maximum 50 characters"), and "Is Active" (a toggle switch currently turned on).
- Contact:** A text field with a placeholder "Maximum 30 characters".
- 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" (with a search icon).
- Phones & Email:** Includes fields for "Office or Primary Phone", "Ext" (with a value of 0), "Mobile", "Home", "Fax", "Email", and "Website" (with a placeholder "Include http:// or https://").
- Additional Vendor Contacts:** A section with two rows, "Contact 2" and "Contact 3", each with a text field and a dropdown menu.

At the bottom of the form, there is a "History" section and a "Save" button with a dropdown arrow.

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

✓ 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 | White House | DC | 20500 | CATERING | CATERING | False | True | True |
| 104 | Washington | DC | 20004 | CATERING | CATERING | False | True | True |
| 105 | Client Residence | Baltimore | MD 21203 | CATERING | CATERING | False | True | True |
| 106 | The Anderson House | Washington | DC 20008 | CATERING | CATERING | False | True | True |
| 107 | Krissia Test | Beverly Hills | CA 90210 | CATERING | CATERING | False | True | True |
| 108 | Good Venue Ltd | Austin | TX 73301 | CATERING | CATERING | False | True | False |
| 109 | Venue Test 2 | Houston | TX 77015 | CATERING | CATERING | False | True | False |
| 110 | Kriss House | Des Allemands | LA 70030 | CATERING | CATERING | False | True | False |
| 111 | Fudem | Houston | TX 77003 | CATERING | CATERING | False | True | False |

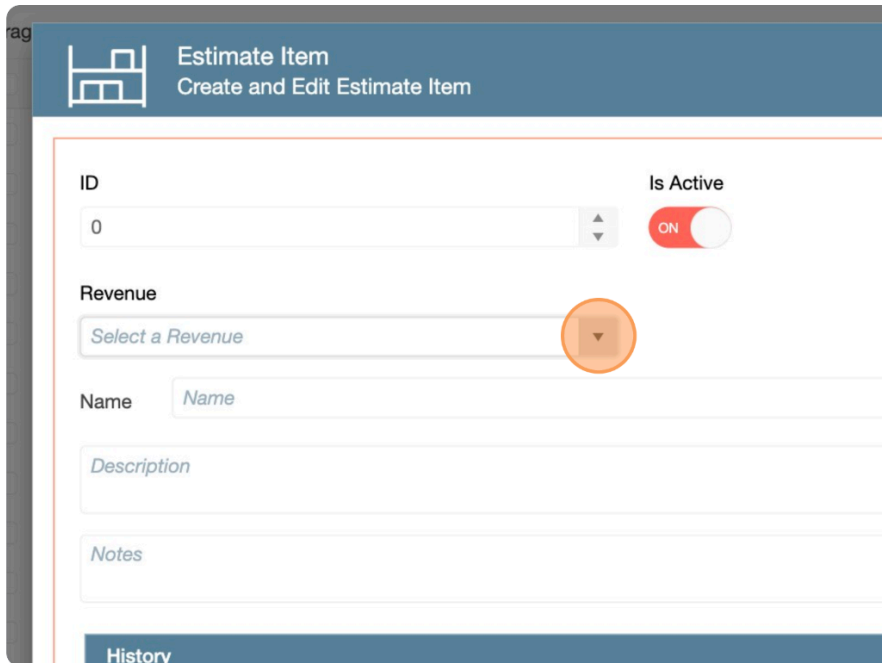
General Setup



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*.

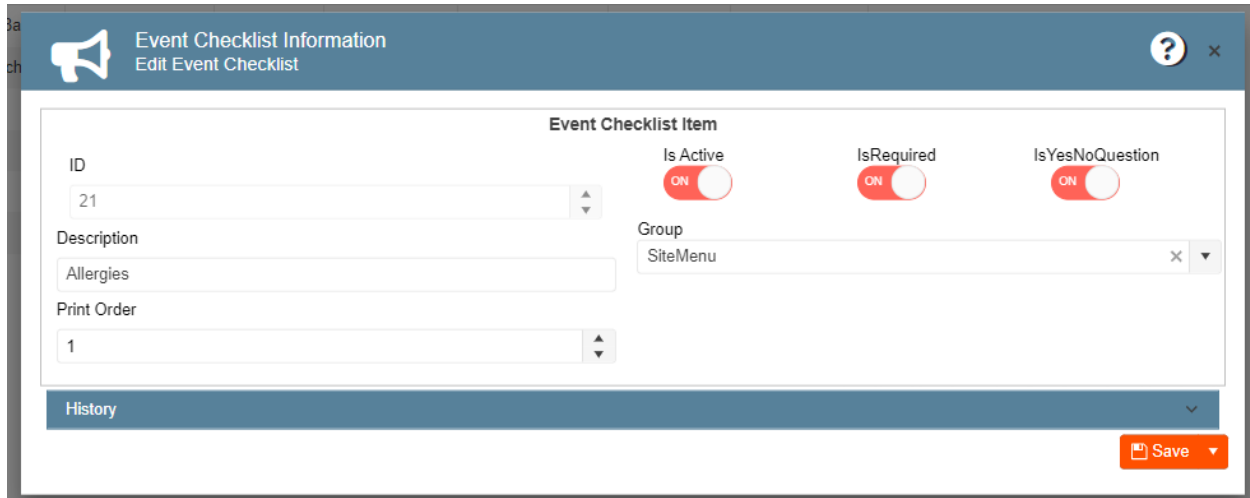


Create and Edit Checklist Items – Kitchen Questionnaire

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*.



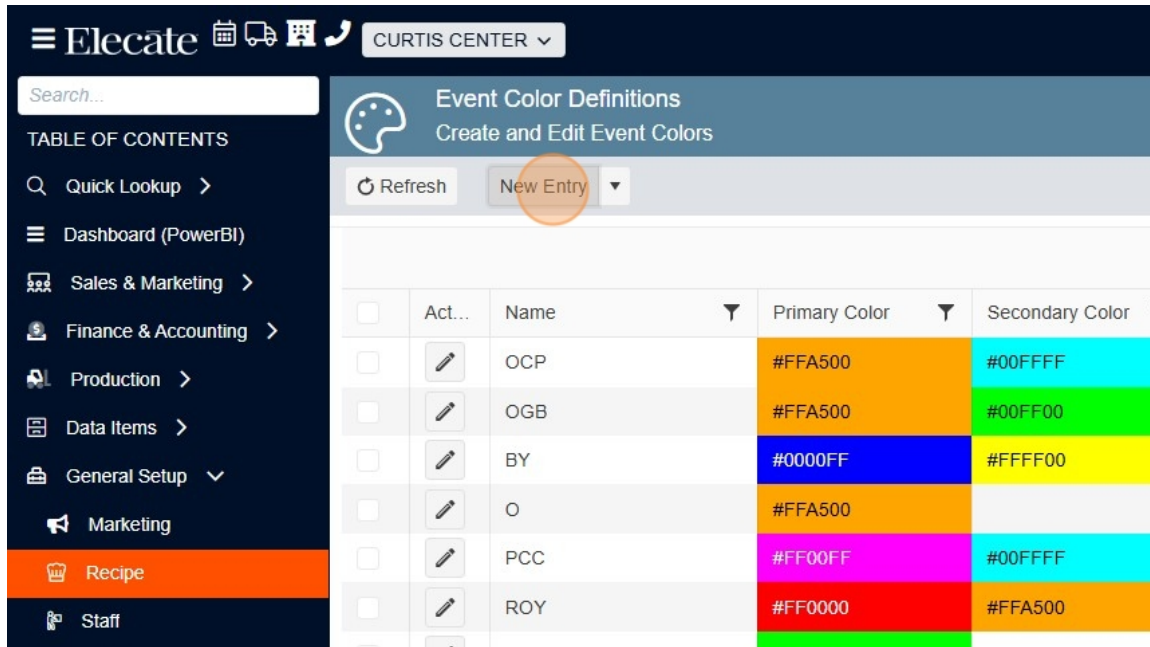
The screenshot shows a web interface for editing an event checklist item. The header bar is blue with a megaphone icon, the text "Event Checklist Information", and a link "Edit Event Checklist". A help icon (?) is in the top right. The main form area is titled "Event Checklist Item" and contains several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

Culinary

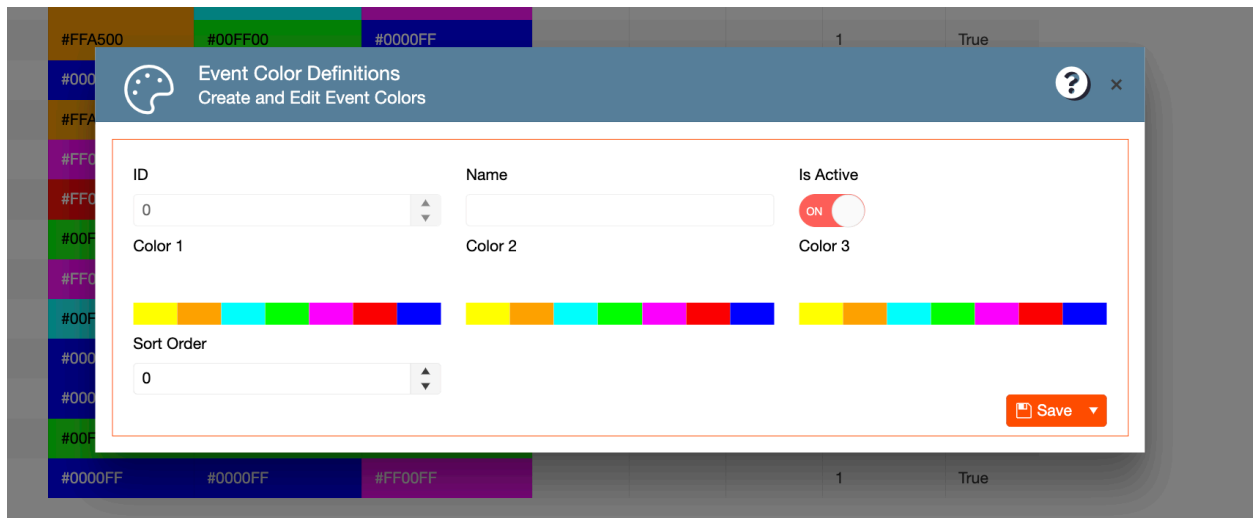
Event Color Definitions

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



- 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.
- Enter the *Sort Order* Number desired
- Click *Save*. The new color combination has been saved and can now be assigned to events.