



GETTING STARTED – ALL USERS

BOOKING A NEW EVENT	EVENT MANAGEMENT TOOLS	PROCESSING PAYMENTS WITH MOSAIC
<ul style="list-style-type: none"> Accessing the Event Wizard Adding a New Client Adding Contact People Entering Event Details Building an Event's Menu Entering General Event Comments Generating and Emailing a Print Posting a Payment 	<ul style="list-style-type: none"> Searching for an Event Creating an Event Timeline Creating an Event Checklist Copying Events Managing Tax/Service Charge Rates Scheduling Future Payments Evaluating Cost/Profit Applying Discounts Attaching Files Sharing the Event Through the Portal 	<ul style="list-style-type: none"> Storing a card on file Processing a card payment manually Processing a payment on a new card Customizing the payment link invoice Sending a payment link Creating a payment link email template Refunding payments Managing payment links Tracking payments

SETTING UP – ADMINISTRATIVE USERS

ANY USERS

SETTING UP ONLINE ORDERING	CUSTOMIZING EVENT PRINTS	SETTING UP DEFAULT MENUS	GENERAL PROGRAM SETUP	GENERAL Q&A
<ul style="list-style-type: none"> Preparing Caterease menus Exporting menus for online ordering Organizing your online menus Assigning menus to the online storefront Establishing online ordering settings Creating delivery zones 	<ul style="list-style-type: none"> Accessing Print Designer Adding a New Print Changing Print Headers Saving and Previewing Changes Customizing and Suppressing Sections Modifying Food/Service Item Details Editing Top/Bottom Notes Language Translations Changing Print Fonts Changing Print Layouts Modifying Back-of- House Prints Sampling Reports 	<ul style="list-style-type: none"> Confirming Food/Service Item Types and Default Tax Rates Rearranging Menus in Menu Manager Adding New Menus and Menu Items Modifying Menu Item Details Establishing Minimum, Linked, and Inventory Quantities Changing Food/Service Items in Batch Creating Modifiers Building Automatic Menu Packages 	<ul style="list-style-type: none"> Customizing Quickpick Lists Renaming Fields Establishing New Booking Defaults Creating Required Fields Creating and Displaying Custom Fields Setting up the Scratch Pad Limiting Daily Number of Events Establishing Security Setting Up Default Timelines & Checklists 	<ul style="list-style-type: none"> Up to 5 questions per company submitted in advance Additional private training may be recommended