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KITCHEN/EVENT REPORTING	MANAGE DELIVERIES	CUSTOMER FACING	MARKETING
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## Support and Contact Information

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# Caterzen Account Set Up

To get your CaterZen account started, there are a few things to get in place. Below are a few things you can begin doing to get your account fully set up and ready for use!

## Catering Menu Entry

Upon signing up for CaterZen, our team will enter in your first 200 menu items completely free. If you have more than 200 items, you can have our team enter them in for you (for a small additional fee) or you can learn to enter in menu items into your own account. Here are a few videos that will train you how to manage your menu.

**How to Create  
Menus, Categories and  
Items**

**How to Create Options,  
Extras and Toppings**

**How to Edit an Item**

## Import Client Database

If you have a current database of your clients and prospects that you would like uploaded to CaterZen, you can import them into you CRM. The video below will show you how to format your database into an excel spreadsheet and how to import it into your CaterZen Account.

**How to Import Your  
Database**

## Create Proposal Graphics

Through CaterZen you will have the ability to send quotes to your customers for review. One of the additional features you will receive is the customer design work that pairs along with those quotes. The video below will explain what all is included and what we would need to begin the design work.

**Custom Proposal  
Explanation and Design**

## Add Employees

One of the first things you'll want to do after starting your CaterZen account, is add Employees (users). You can add unlimited users to your account at no cost. Each person can be set up with a unique mix of permissions so that each employee is set up with the appropriate amount of access.

**How to Add Employees**

# Caterzen Account Set Up

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## Delivery Zones

Delivery Zones allow you to draw on a map where you will deliver too and what you will charge for that particular area of town. These are a great way to ensure accuracy and automation for your delivery charges.

**How to Create Delivery  
Zones**

# Take Orders

## Order Entry

The Order Entry tab of your CaterZen account may very well be the most important feature in your software.

This is where the magic happens. Mastering this page can mean the difference between clean customer history and accurate reporting.

In the video below you will learn how to Enter your customer, Place an Order and Pull your daily reporting. This is a great video to share with your immediate team as well as anyone else who will be managing your catering orders.

**How to Place an  
Order**

## Mobile Order Taking

Our Mobile Order Taking interface makes quick work out of creating new orders. Look up an existing client or create one on the fly and turn basic event questions into an order that ends up in our software, your calendar and the client's inbox.

**How to Create A  
Mobile Shortcut**

**Taking an Order:  
Customer Info**

**Taking an Order:  
Menu Item Info**

# Customer Contact

## CRM

The CRM (Customer Relationship Manager) is where all of your customer data is stored. Here you can easily recall order history, invoices, notes on food allergies, etc. Using this tab to its full advantage can make the difference between constant reliable contact and a database of only half information. In the videos below you will learn all of the facets of this module and how to begin using it to your advantage.

[CRM Icon Review](#)

[Personal Data vs. Company Data](#)

## Phone System

Our phone system can be set up to forward your catering calls to the people on your team who are best equipped to handle them. This system records your calls in your CaterZen account so you can play them back for review. **Please note that this system has an additional fee associated with the calls. (\$0.06/minute for inbound calls, \$0.05/minute for outbound calls)**

[Phone System Review](#)

## Google Connect

If you or your team uses Gmail or Google Calendar to manage your catering communication and schedule, you can easily connect your Google Account to your CaterZen account. The video below will show you how to complete the connection so that you can easily see your CaterZen orders on your Google Calendar and email your customers directly from your CaterZen CRM.

[How to Connect to Google](#)

## Lead Forms

Collecting your customers information has never been easier. By creating a Lead Capture form, you can easily embed forms into your website for your customers to fill out. This information gets captured into your CaterZen account and you get notified when someone fills it out so you can follow up about your prospects upcoming event.

[Lead Form Creation and Application](#)

# Accounting

## Credit Card Processing

In CaterZen you have the ability to connect your account to a credit card processor to run your customers credit card payments. We integrate with two different processors. One of the processors can also act as a gateway if you currently use a processor to run your payments. The video below will walk you through these two processors to help you decide if one is best for you and how to set it up.

**Braintree Vs.  
Authorize.net**

**Credit Card Processing  
Settings**

## Accounting Tab Reports

In your accounting tab there are several reports that will help you with your accounting as it relates to your catering orders in the system. In this video we explore those different reports.

**Accounting Reports  
Explained**

## Invoicing

Invoicing is a very important step in your billing. It's also how you can see who has paid, and who hasn't. In this video we go over how to manage your invoices, as well as how to send them to your customers.

**How to Use Invoicing**

# Accounting

## Sales Tax

Our sales tax module provides you with the flexibility to set up tax rates for every kind of taxing scenario for your business. The video below explains how the Sales Tax Module works. For specifics or help setting up your Sales Tax Module, book a session at [www.BookTimeWithMeredith.com](http://www.BookTimeWithMeredith.com)

**How to Set Up Sales  
Tax Module**

## Refunds

Whether an order cancels, or a partial refund is due, the Refund module can help you ensure that your reports are accurate. If you use Braintree/Authorize.net to process your credit card payments, this will also be how you will issue refund to your customers credit cards.

**How to Issue a  
Refund**

## QuickBooks

After connecting your Quickbooks account through the Admin area, you'll be able to assign your sales journal categories to Quickbooks' categories. The video below will teach you how to connect your CaterZen account to Quickbooks.

**How to Connect to  
Quickbooks**

# Kitchen/Event Reporting

## Kitchen Production Reports

For many people, their Kitchen Production Reports are a huge factor in their operations running smoothly. This is one of the few sessions that will absolutely require a bit of set up work and a session with Meredith Dillard. You can book a time with her to set these up by going to [www.BookTimeWithMeredith.com](http://www.BookTimeWithMeredith.com).

**Kitchen Production  
Reports Explained**

## Reports Tab

In CaterZen, you have a section of your software that manages your reporting. Sales Reports, Database Reports, To-Do Reports, etc. In this video we will dive into some of the more commonly used reports by our clients.

**Reports Explained**

## Overview Tab

Your overview tab will often act as your snapshot into your daily orders. From this tab you can see orders within a specific date range, as well as the reports that correlate with them. In this video we break down this page and all of its features.

**Overview Reports  
Explained**

## BEO Manager

A BEO can help organize your team and give a clear plan for execution for your events. In the videos below you will learn how to create BEO templates to use for different types of catered events, as well as how to apply those templates to your catering orders.

**How to Create a BEO  
Template**

**How to Use a BEO  
Template**



# Manage Deliveries

## Delivery Module

Before taking the following steps, please watch the following video. It will put these steps into motion and give you a look at the internal and external functions of our Delivery Driver App.

### Delivery Manager Demo

#### Step 1: How to Add Drivers

#### Step 2: Download Driver App

App is "CaterZen Driver"

Give them the log in that you created for them in Step 1.

#### Step 3: Set Driver Settings

#### Step 4: Route Orders

#### Step 5: Driver Uses App

#### Additional Driver Module Articles

## Venue Manager

Another way to easily manager deliveries is to utilize your Venue Manager. You can create multiple venues or destinations that you frequent for multiple customers so that the address is stored in your account for you and your customers to easily select, rather than having to look up and type in that information each time.

### How to Set Up Venues

# Customer Facing

## Online Ordering Interface

One of our client's favorite CaterZen features is the Online Ordering Interface that allows their customers to easily place orders online. Our designer will work with you to create a branded page. The video below will show you the capabilities of this page.

**Online Ordering  
Interface Walkthrough**

## Quotes

When a customer is looking for information about your catering services, one of the great things you can provide them with is a quote. This will show them an example of what an order would include and how much it would cost. You can create a quote for your customer from within CaterZen, or they can place it online through your online ordering interface. Once the customer is ready, these quotes can quickly be converted to orders with just a few clicks.

**How to Create a Quote**

**Converting a Quote to an  
Order**

## Contracts

Many caterers require contracts before placing orders for their clients. Our contract module allows you to create custom contracts that include e-signatures so your customers can quickly sign and return back to you. In the videos below we'll show you how to create a contract template and how to put it to use.

**How to Create a Contract  
Template**

**How to Use a Contract**

# Marketing

## Auto Pilot Marketing Letters

These letters are set up to work for you automatically based on parameters that you will select to put in place. These letters are direct mail, so they will go through a mail house and to the post office. **Please note that these letters have an additional fee associated with them. (\$1.51 per letter, \$1.39 per postcard)**

**Marketing Letter Videos  
and Set Up Forms**

## Email Marketing

Through RCS you can mass email your database. You can choose to create an email campaign from scratch or use one of our pre-written templates. There is no cost associated with these emails, however you must agree to not use this system to send spam or to email people who have not opted in or given you their email address to use.

**How to Create an  
Email Campaign**

**How to Use an Email  
Template**

## Marketing Calendar

The Marketing Calendar is a great tool to use to keep your marketing efforts on track year round. This calendar will tell you exactly what you should be working on each week of the year. You can also set up reminders to yourself and your team so you never miss a beat.

**Marketing Calendar  
Walkthrough**

## Restaurant Profit Point

Another great benefit to being a CaterZen customer is your membership to Restaurant Profit Point.

This marketing resource library has everything you need to market your catering services. Everything from Menu Templates, to Call Scripts and Sales Letters. This members only site is full of great resources and podcasts to help you in your marketing journey.

**Restaurant Profit  
Point Walkthrough**