



Banquets - Event Services Settings

2016 - Winter Edition

User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Accessing Event Services](#)

[Managing Service Item Categories](#)

[Creating New Service Item Categories](#)

[Deleting Service Item Categories](#)

[Editing Service Item Categories](#)

[Manage Service Items](#)

[Creating New Service Items](#)

[Deleting Service Items](#)

[Editing Service Items](#)

[Manage Service Types](#)

[Creating New Service Types](#)

[Deleting Service Types](#)

[Editing Service Types](#)

[Manage Service Menu Categories](#)

[Creating New Service Menu Categories](#)

[Deleting Service Menu Categories](#)

[Editing Service Menu Categories](#)

[Manage Service Menus](#)

[Creating New Service Menus](#)

[Deleting Service Menus](#)

[Editing Service Menus](#)

[FAQs](#)

[Best Practices](#)

Overview

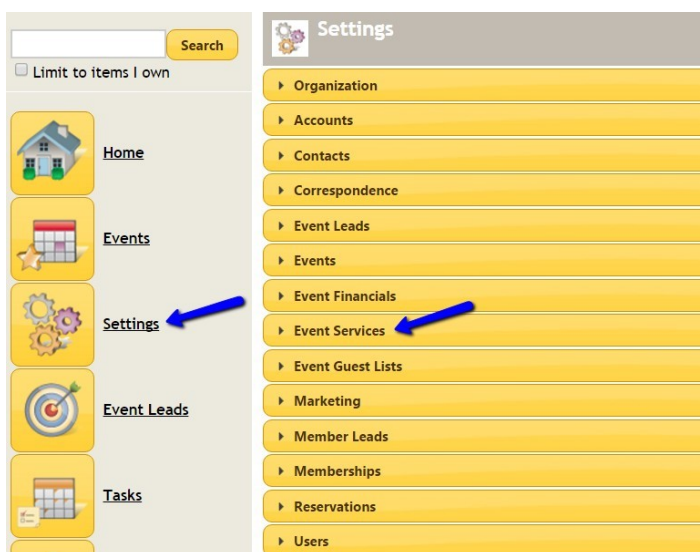
The **Event Services** section of the **Banquets** system enables a **Banquet/Event Manager** to formalize the relationship and categorization of **Items** that will be served and/or provided during the event, and define how the pricing will be established. Understanding how **Service Items**, **Service Item Categories**, **Service Types**, **Menus**, **Menu Categories** and **Pricing Structure** interact and are assigned is imperative to properly establishing them within the event.

Use Case(s)

Dinner will be served during the reception of the Smith wedding to occur next July. The 4-course Reception Menu established from the Wedding Menu Category will be utilized, and will be broken down into 4 Item Categories: (1) Appetizer, (2) Soup/Salad, (3) Main Entree, and (4) Dessert. Within each course, two service Items will be available for the guests to choose from - ie. Appetizer will have Shrimp Cocktail and Beef Tartar as available Service Item options. Pricing on the dinner will be a fixed, all-inclusive, package pricing per person. Additionally, an open bar will be maintained with an ala carte pricing structure. Cake Cutting and A/V services will also be required during the event, and have been set up as separate Service Types.

Accessing Event Services

To access Service Item Categories, Services Items, Service Types, Menus, and Menu Categories, navigate to **Settings**, and then **click Event Services**.



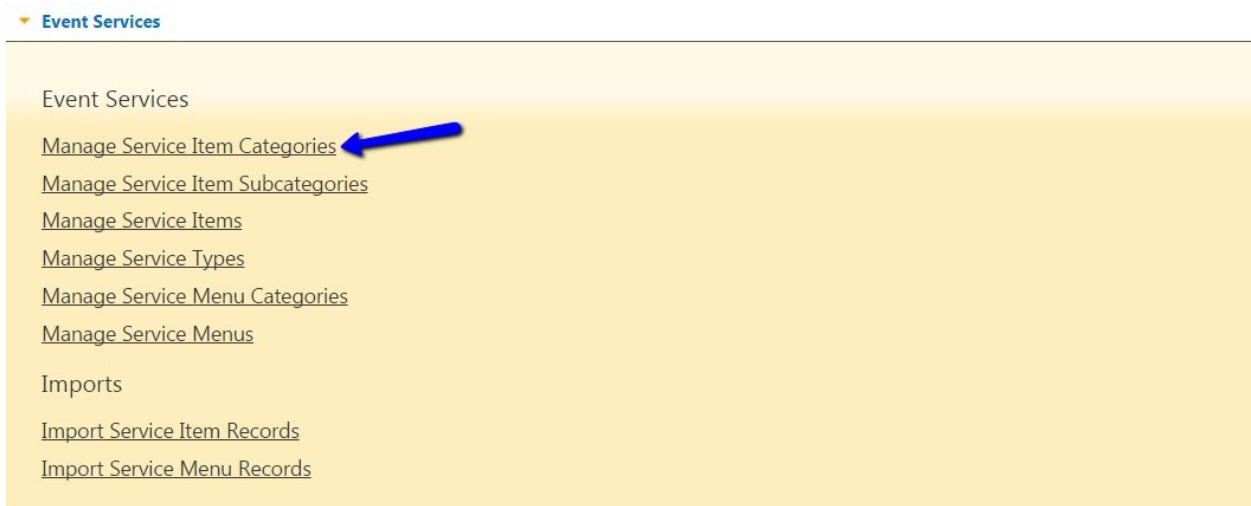
Then, follow instructions below for specific Event Service Settings.

Managing Service Item Categories

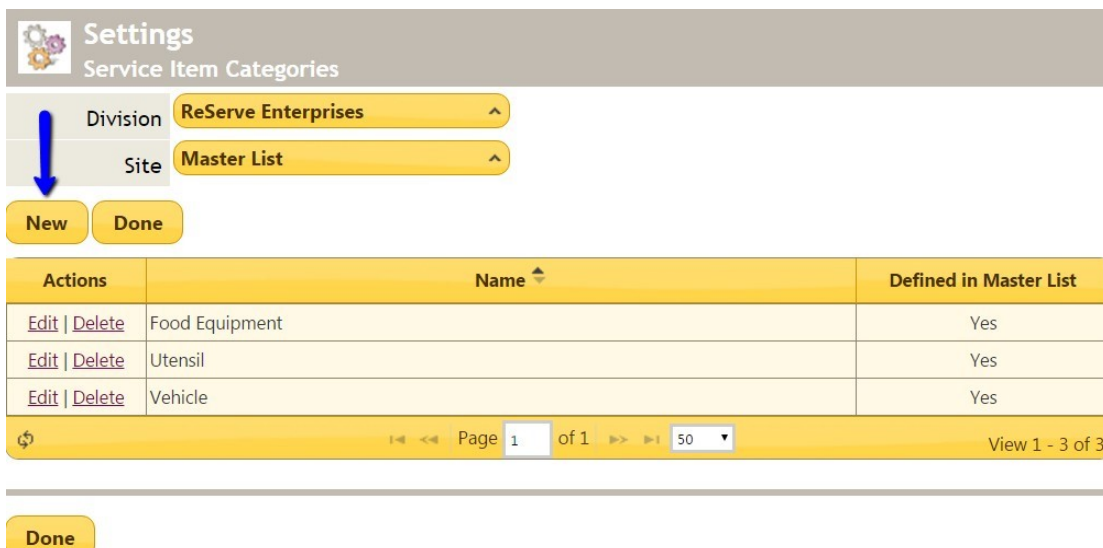
Creating **Service Item Categories** is helpful in managing service items, as they allow you to easily **search** for the **items**. Item Categories serve to help group Service Items (such as Shrimp Cocktail or Beef TarTar) into meaningful buckets, such as Appetizers, Soups, Entrees, Desserts, etc. There are numerous ways to categorize items.

Creating New Service Item Categories

To establish an Item Category, navigate to Event Services as previously shown, and then **click Manage Service Item Categories**.




Click the **New** button.

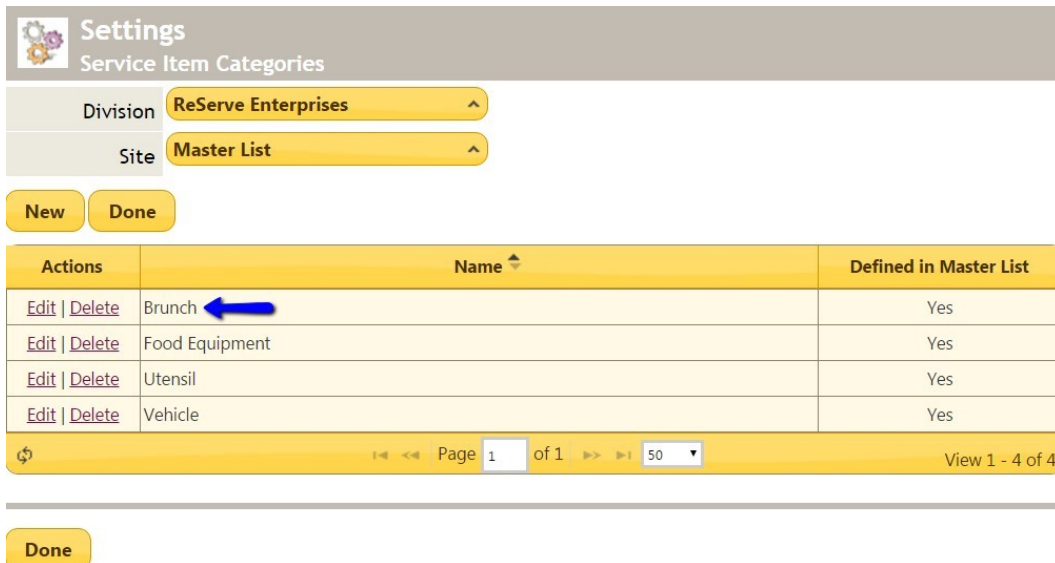


Note: Multi-site Organizations, with site specific item categories that are not shared across their organization, will want to add and/or edit item categories within the appropriate site(s). Multi-site Organizations whose item categories ARE shared across all sites will want to add and/or edit item categories within the Master List. Organizations with a single site will want to add/edit item categories where they see the 'edit' link available next to the existing item categories. This could be at the Master or Site level.

Enter the **Service Item Category** name, then **click Save**.




The new **service item category** is then displayed with all the other categories.




Actions	Name	Defined in Master List
Edit Delete	Brunch	Yes
Edit Delete	Food Equipment	Yes
Edit Delete	Utensil	Yes
Edit Delete	Vehicle	Yes


Deleting Service Item Categories



To **delete** a **Service Item Category**, follow the same steps as above until you reach the step where you would **click** the New button. Instead of clicking this button, **click** the **Delete** link next to the **category** you wish to remove.

Division
ReServe Enterprises 

Site
Master List 

New
Done

Actions	Name 	Defined in Master List
Edit Delete	Appetizers	Yes
Edit Delete	Audio, Video & Lighting Equipment	Yes
Edit Delete	Chairs	Yes
Edit Delete	Concessions	Yes
Edit Delete	Décor	Yes
Edit Delete	Game's & Inflatables	Yes
Edit Delete	Linens	Yes
Edit Delete	Set Up and Tear Down Fees	Yes
Edit Delete	Tables	Yes
Edit Delete	Tent	Yes
Edit Delete	Utensil	Yes
Edit Delete	Vehicle	Yes


Page 1 of 1
50 
View 1 - 12 of 12

Note: Multi-site Organizations, with site specific item categories that are not shared across their organization, will want to add and/or edit item categories within the appropriate site(s). Multi-site Organizations whose item categories ARE shared across all sites will want to add and/or edit item categories within the Master List. Organizations with a single site will want to add/edit item categories where they see the 'edit' link available next to the existing item categories. This could be at the Master or Site level.

Editing Service Item Categories

To edit a **Service Item Category**, click the **Edit link** next to the **category** you wish to change.

[New](#) [Done](#)

Actions	Name	Defined in Master List
Edit Delete	Appetizers	Yes
Edit Delete	Audio, Video & Lighting Equipment	Yes
Edit Delete	Chairs	Yes
Edit Delete	Concessions	Yes
Edit Delete	Décor	Yes
Edit Delete	Game's & Inflatables	Yes
Edit Delete	Linens	Yes
Edit Delete	Set Up and Tear Down Fees	Yes
Edit Delete	Tables	Yes
Edit Delete	Tent	Yes
Edit Delete	Utensil	Yes
Edit Delete	Vehicle	Yes

Page 1 of 1 50 View 1 - 12 of 12

Note: Multi-site Organizations, with site specific item categories that are not shared across their organization, will want to add and/or edit item categories within the appropriate site(s). Multi-site Organizations whose item categories ARE shared across all sites will want to add and/or edit item categories within the Master List. Organizations with a single site will want to add/edit item categories where they see the 'edit' link available next to the existing item categories. This could be at the Master or Site level.

You will be brought to the **edit screen** where you can change the **name** or **spelling** of the **Service Item Category**. Click **Save** when finished.


Settings
 Edit Service Item Category

Service Item Category

[Save](#) [Cancel](#)

The updated **Service Item Category** name is displayed with the other **categories**, and all **service items** that had the **original category name** will be updated with the **new category name**.

Division **ReServe Enterprises** ^

Site **Master List** ^

New **Done**

Actions	Name	Defined in Master List
Edit Delete	Appetizers & Hors D'oeuvres	Yes
Edit Delete	Audio, Video & Lighting Equipment	Yes
Edit Delete	Chairs	Yes
Edit Delete	Concessions	Yes
Edit Delete	Décor	Yes
Edit Delete	Game's & Inflatables	Yes
Edit Delete	Linens	Yes
Edit Delete	Set Up and Tear Down Fees	Yes
Edit Delete	Tables	Yes
Edit Delete	Tent	Yes
Edit Delete	Utensil	Yes
Edit Delete	Vehicle	Yes

Page 1 of 1 50 View 1 - 12 of 12

Note: Item Subcategories are also available for setup, and function similar to categories, but could be used to break down categories into further groupings. For instance, if a Category of Appetizer was established, two subcategories could be established, such as Hot Appetizers and Cold Appetizers.

Manage Service Items


Service Items must be created before they can be added to menus. A **Service Item** is any Item that will be served in the course of an event, such as a Steak, Shrimp Scampi, Mashed Potatoes, or a glass of Dom Perignon.

Creating New Service Items

To establish a Service Item, navigate to Event Services as previously shown, and then **click Manage Service Items**.

▼ Event Services

Event Services

- [Manage Service Item Categories](#)
- [Manage Service Item Subcategories](#)
- [Manage Service Items](#) 
- [Manage Service Types](#)
- [Manage Service Menu Categories](#)
- [Manage Service Menus](#)

Imports

- [Import Service Item Records](#)
- [Import Service Menu Records](#)

Note: Multi-site Organizations, with site specific items that are not shared across their organization, will want to add and/or edit items within the appropriate site(s). Multi-site Organizations whose items ARE shared across all sites will want to add and/or edit items within the Master List. Organizations with a single site will want to add/edit items where they see the 'edit' link available next to the existing items. This could be at the Master or Site level.

Click the New button.

Settings
Service Items

Division **ReServe Enterprises** ^

Site **Master List** ^




Revenue Center **Show All** ^

Item Is Custom **No** ^

Search String

Category **Show All** ^

Subcategory **Show All** ^

 **New**
 **Delete Selected**
 **Done**

<input type="checkbox"/>	Actions	Name ↑	A La Carte Price	Add-On Price	Cost	Revenue Center	Applied Rates	Category	Subcategory	Custom	Defined in Master List
<input type="checkbox"/>	Edit Related Items Delete	Mineral Waters	\$0.00	\$0.00	\$0.00	Food	Service Charge and Sales Tax			No	Yes
<input type="checkbox"/>	Edit Related Items Delete	Mineral Waters	\$0.00	\$0.00	\$0.00	Non Alcoholic Beverage	Service Charge and Sales Tax			No	Yes
<input type="checkbox"/>	Edit Related Items Delete	Murrieta's Well Vendimia Red	\$0.00	\$0.00	\$0.00	Alcoholic Beverage	Service Charge and Sales Tax			No	Yes

You will now be taken to the screen where you can **create a Service Item**. You can enter in as little or as much information about the item as you would like. However, if you want to enter in a **price**, the item **MUST have a Revenue Center**.

Settings
 Edit Service Item

Save Cancel

Service Item Details

Service Item Name	Enter in the Item Name Here
Description	You can put a Description Here if you would like
Revenue Center	Food
Applied Rates	Service Charge and Sales Tax
A La Carte Price	\$0.00
Add-On Price	\$0.00
Cost	\$0.00
Category	None
Subcategory	None
Auto Calculate Quantity	<input checked="" type="checkbox"/>
Number Required	1.00
Per Number of Guests	1
Quantity Precision	Whole
Charge Hourly	<input type="checkbox"/>
Auto Calculate Hours	N/A
Mark Item Internal	<input type="checkbox"/>
Item Number	

***Note** that when you **select** a **Revenue Center** it automatically populates the **applied rates**. These can be toggled if the item needs another set of **applied rates**.

A **completed Service Item** might look like this. **Click Save** when finished.


Settings
 Edit Service Item

Save Cancel

Service Item Details

Service Item Name	Belgian Waffles
Description	belgian waffles covered in strawberries and bananas
Revenue Center	Food
Applied Rates	Service Charge and Sales Tax
A La Carte Price	\$12.00
Add-On Price	\$12.00
Cost	\$4.00
Category	Brunch
Subcategory	Vegetarian
Auto Calculate Quantity	<input type="checkbox"/>
Number Required	N/A
Per Number of Guests	N/A
Quantity Precision	Whole
Charge Hourly	<input type="checkbox"/>
Auto Calculate Hours	N/A
Mark Item Internal	<input type="checkbox"/>
Item Number	

The completed item then displays with all of the other **Service Items**.

 Settings
Service Items

Division **ReServe Enterprises** ^

Site **Master List** ^

Revenue Center **Show All** ^

Item Is Custom **No** ^

Search String

Category **Show All** ^


Subcategory **Show All** ^

New
Delete Selected
Done

	Actions	Name	A La Carte Price	Add-On Price	Cost	Revenue Center	Applied Rates	Category	Subcategory	Custom	Defined in Master List
<input type="checkbox"/>	Edit Related Items Delete	Belgian Waffles	\$12.00	\$12.00	\$4.00	Food	Service Charge and Sales Tax	Brunch	Vegetaria	No	
<input type="checkbox"/>	Edit Related Items Delete	Mineral Waters	\$0.00	\$0.00	\$0.00	Non Alcoholic Beverage	Service Charge and Sales Tax			No	
<input type="checkbox"/>	Edit Related Items Delete	Mineral Waters	\$0.00	\$0.00	\$0.00	Food	Service Charge and Sales Tax			No	
<input type="checkbox"/>	Edit Related Items Delete	Murrieta's Well Vendimia Red	\$0.00	\$0.00	\$0.00	Alcoholic Beverage	Service Charge and Sales Tax			No	
<input type="checkbox"/>	Edit Related Items Delete	NAPKINS: Black	\$0.00	\$0.00	\$0.00	Linens	Sales Tax Only			No	

Deleting Service Items

To **delete** a **Service Item**, follow the same steps as above until you reach the step where you would press the New button. Instead of pressing this button, **click the Delete link** next to the item you wish to remove.

 Settings
Service Items

Division **ReServe Enterprises** ^

Site **Master List** ^

Revenue Center **Show All** ^

Item Is Custom **No** ^

Search String

Category **Show All** ^


Subcategory **Show All** ^

New
Delete Selected
Done

	Actions	Name	A La Carte Price	Add-On Price	Cost	Revenue Center	Applied Rates	Category	Subcategory	Custom	Defined in Master List
<input type="checkbox"/>	Edit Related Items Delete	Assorted Housemade Pastries	\$0.00	\$0.00	\$0.00	Food	Service Charge and Sales Tax			No	Yes
<input type="checkbox"/>	Edit Related Items Delete	White Bean Salad with Rock Shrimp, Radicchio, Citrus Vinaigrette and Herb Oil	\$0.00	\$0.00	\$0.00	Food	Service Charge and Sales Tax			No	Yes
<input type="checkbox"/>	Edit Related Items Delete	Assorted Cookies and Brownies (per dozen)	\$0.00	\$0.00	\$0.00	Food	Service Charge and Sales Tax			No	Yes

Editing Service Items

To **edit** a **Service Item**, click the **Edit** link next to the **item** you wish to change.

 Settings
Service Items

Division: ReServe Enterprises ^

Site: Master List ^

Revenue Center: Show All ^

Item Is Custom: No ^

Search String:


Category: Show All ^

Subcategory: Show All ^

New
Delete Selected
Done

<input type="checkbox"/>	Actions	Name	A La Carte Price	Add-On Price	Cost	Revenue Center	Applied Rates	Category	Subcategory	Custom	Defined in Master List
<input type="checkbox"/>	Edit Related Items Delete	Assorted Housemade Pastries	\$0.00	\$0.00	\$0.00	Food	Service Charge and Sales Tax			No	Yes
<input type="checkbox"/>	Edit Related Items Delete	White Bean Salad with Rock Shrimp, Radicchio, Citrus Vinaigrette and Herb Oil	\$0.00	\$0.00	\$0.00	Food	Service Charge and Sales Tax			No	Yes
<input type="checkbox"/>	Edit Related Items Delete	Assorted Cookies and Brownies (per dozen)	\$0.00	\$0.00	\$0.00	Food	Service Charge and Sales Tax			No	Yes
<input type="checkbox"/>	Edit Related Items Delete	Assorted Deli Sandwiches	\$0.00	\$0.00	\$0.00	Food	Service Charge and Sales Tax			No	Yes

Make any edits you would like to the **Service Item**. Click **Save** when finished.

 Settings
Edit Service Item

Save
Cancel

Service Item Details

Service Item Name

Assorted Cookies and Brownies

Description

(per dozen)

Revenue Center

Food

Applied Rates

Service Charge and Sales Tax

A La Carte Price

\$12.00

Add-On Price

\$12.00

Cost

\$5.00

Category

Appetizers & Hors D'oeuvres

Subcategory

None

Auto Calculate Quantity

Number Required

N/A

Per Number of Guests

N/A

Quantity Precision

Whole

Charge Hourly

Auto Calculate Hours

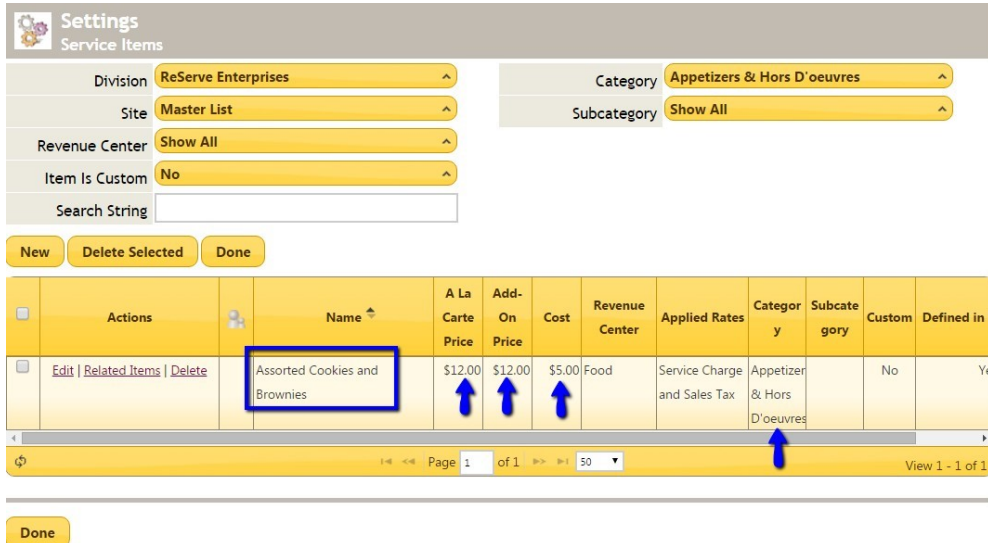
N/A

Mark Item Internal

Item Number

*For the purposes of this example, we edited the Assorted Cookies and Brownies item. We added a description, a price, a cost and placed the item in a category.

The item is then displayed with all of the other items.



*You can see the changes we made in the last step here.

Manage Service Types

Service Types are the **groupings** that **service items** live under in a **menu**. They display in the column on the far left of an event order with services. Examples could include A/V Equipment, Food, Beverages, and many more.

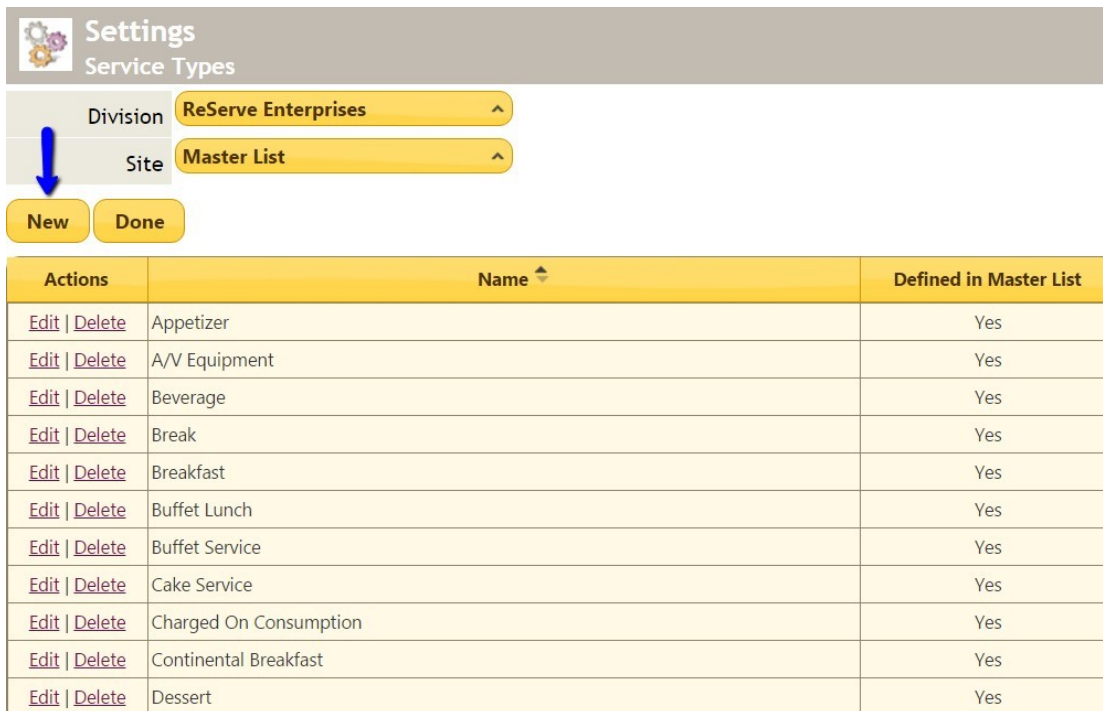
Creating New Service Types

To establish a Service Type, navigate to Event Services as previously shown, and then **click Manage Service Types**.



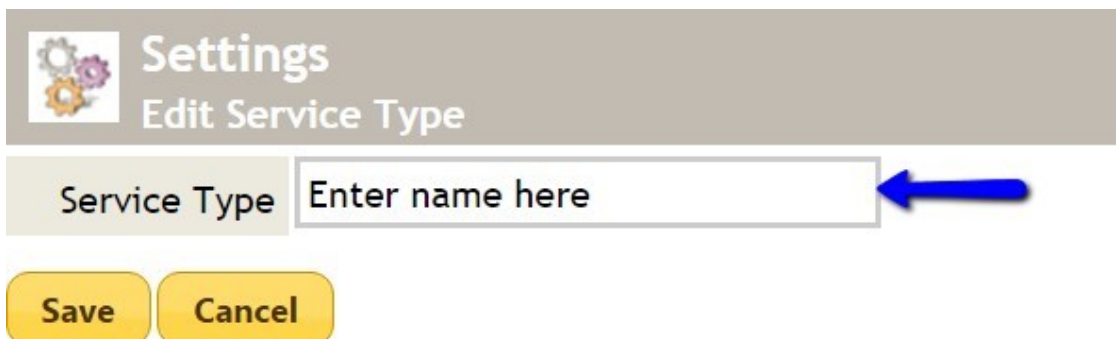
Note: Multi-site Organizations, with site specific service types that are not shared across their organization, will want to add and/or edit service types within the appropriate site(s). Multi-site Organizations whose service types ARE shared across all sites will want to add and/or edit service types within the Master List. Organizations with a single site will want to add/edit service types where they see the 'edit' link available next to the existing service types. This could be at the Master or Site level.

Click the New button.



Actions	Name	Defined in Master List
Edit Delete	Appetizer	Yes
Edit Delete	A/V Equipment	Yes
Edit Delete	Beverage	Yes
Edit Delete	Break	Yes
Edit Delete	Breakfast	Yes
Edit Delete	Buffet Lunch	Yes
Edit Delete	Buffet Service	Yes
Edit Delete	Cake Service	Yes
Edit Delete	Charged On Consumption	Yes
Edit Delete	Continental Breakfast	Yes
Edit Delete	Dessert	Yes


Enter a name into the Service Type area. Click Save when finished.



Service Type

Save **Cancel**



The **new Service Type** is then displayed with all the other **service types**.

 **Settings**
 Service Types

Division ReServe Enterprises ^


Site Master List ^

New
Done

Actions	Name 	Defined in Master List
Edit Delete	Appetizer	Yes
Edit Delete	A/V Equipment	Yes
Edit Delete	Beverage	Yes
Edit Delete	Break	Yes
Edit Delete	Breakfast	Yes
Edit Delete	Buffet Lunch	Yes
Edit Delete	Buffet Service	Yes
Edit Delete	Cake Service	Yes
Edit Delete	Charged On Consumption	Yes
Edit Delete	Coffee Service 	Yes
Edit Delete	Continental Breakfast	Yes

Deleting Service Types



To **delete a Service Type**, follow the same steps as above until you reach the step where you would press the New button. Instead of pressing this button, **click the Delete link** next to the **Service Type** you wish to remove.

 **Settings**
 Service Types

Division ReServe Enterprises ^


Site Master List ^

New
Done

Actions	Name 	Defined in Master List
Edit Delete	Appetizer	Yes
Edit Delete	Beverage	Yes
Edit Delete	Break	Yes
Edit Delete	Breakfast	Yes
Edit Delete	Buffet Lunch 	Yes
Edit Delete	Buffet Service	Yes
Edit Delete	Cake Service	Yes
Edit Delete	Centerpieces & Top of Table Accessories	Yes
Edit Delete	Ceremony Rental Items	Yes

Editing Service Types

To **edit a Service Type**, click the **Edit** link next to the one you wish to change.

 **Settings**
 Service Types

Division ReServe Enterprises ^
 Site Master List ^

New
Done

Actions	Name ^	Defined in Master List
Edit Delete	Appetizer	Yes
Edit Delete	Beverage	Yes
Edit Delete	Break	Yes
Edit Delete	Breakfast	Yes
Edit Delete	Buffet Lunch	Yes
Edit Delete	Buffet Service	Yes
Edit Delete	Cake Service	Yes
Edit Delete	Centerpieces & Top of Table Accessories	Yes
Edit Delete	Ceremony Rental Items	Yes


You will be brought to the **edit screen** where you can change the name or spelling of the **Service Type**. Click **Save** when finished.

 **Settings**
 Edit Service Type

Service Type

Save
Cancel


The updated **Service Type name** is displayed with the other **service types**, and all **service items** that were under the original **service type** in a menu will be updated with the **new service type name**.


Settings
Service Types

Division ReServe Enterprises ^

Site Master List ^

New
Done

Actions	Name 	Defined in Master List
Edit Delete	Appetizer	Yes
Edit Delete	Beverage - Alcoholic	Yes
Edit Delete	Break	Yes
Edit Delete	Breakfast	Yes
Edit Delete	Buffet Lunch	Yes
Edit Delete	Buffet Service	Yes
Edit Delete	Cake Service	Yes
Edit Delete	Centerpieces & Top of Table Accessories	Yes
Edit Delete	Ceremony Rental Items	Yes


Manage Service Menu Categories

Creating Service Menu Categories is helpful in managing service menus. It allows you to **categorize menus** so that they are easily distinguishable from one another. Examples could include Beverage Menus, Food Menus, Service Menus etc.

Creating New Service Menu Categories

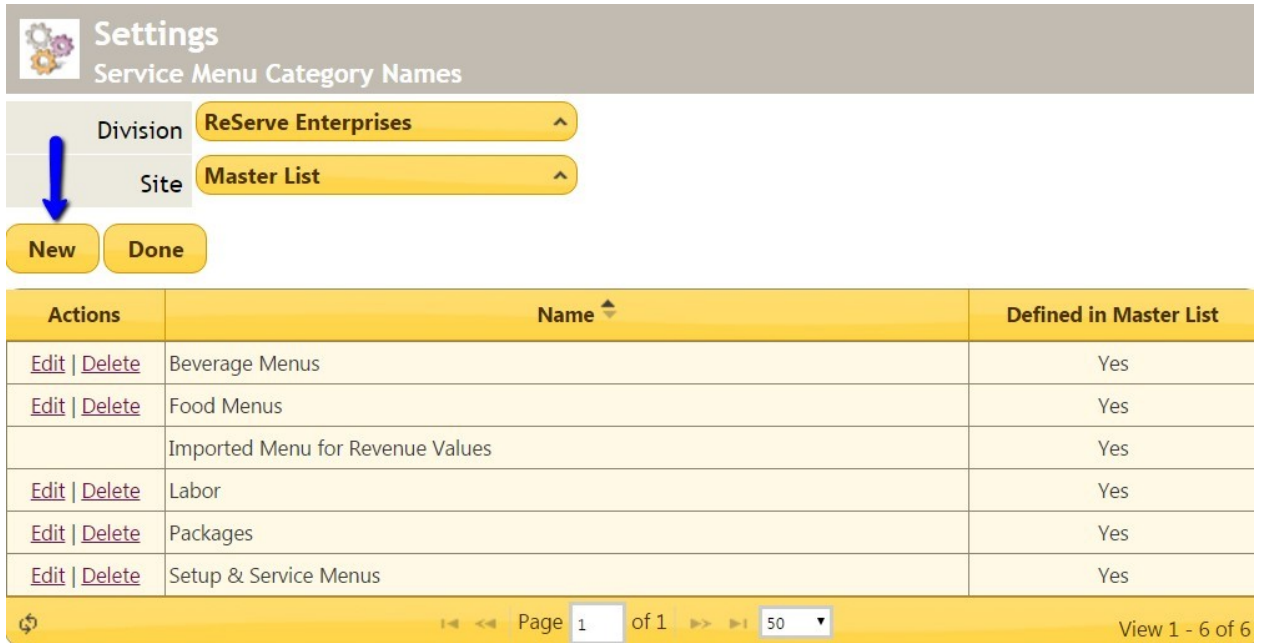
To establish a Service Menu Category, navigate to Event Services as previously shown, and then **click Manage Service Menu Categories**.

▼ **Event Services**

- Event Services
- [Manage Service Item Categories](#)
- [Manage Service Item Subcategories](#)
- [Manage Service Items](#)
- [Manage Service Types](#)
- [Manage Service Menu Categories](#) 
- [Manage Service Menus](#)
- Imports
- [Import Service Item Records](#)
- [Import Service Menu Records](#)

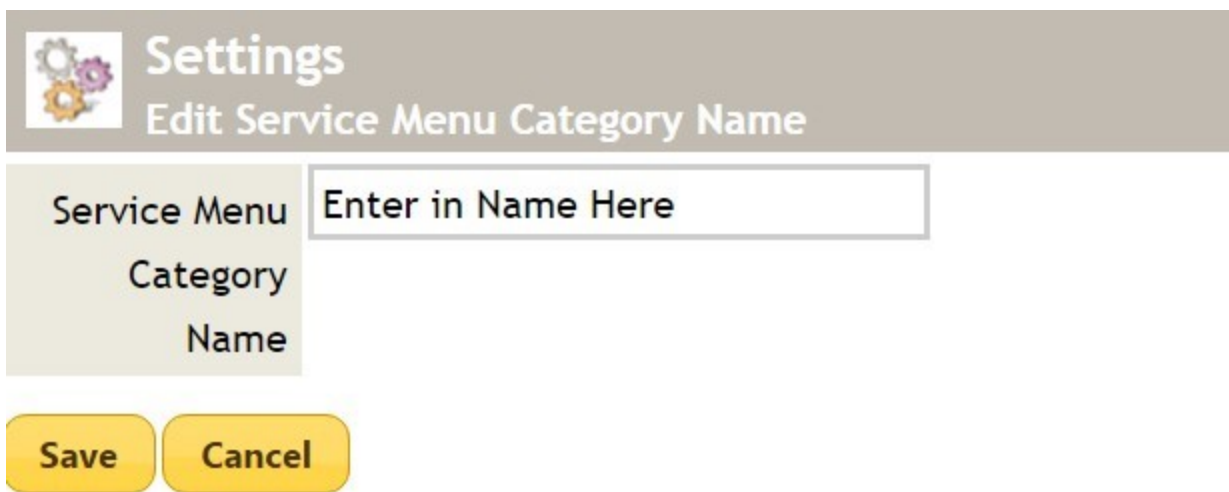
Note: Multi-site Organizations, with site specific menu categories that are not shared across their organization, will want to add and/or edit menu categories within the appropriate site(s). Multi-site Organizations whose menu categories ARE shared across all sites will want to add and/or edit menu categories within the Master List. Organizations with a single site will want to add/edit menu categories where they see the 'edit' link available next to the existing menu categories. This could be at the Master or Site level.

Click the **New** button.



Actions	Name	Defined in Master List
Edit Delete	Beverage Menus	Yes
Edit Delete	Food Menus	Yes
	Imported Menu for Revenue Values	Yes
Edit Delete	Labor	Yes
Edit Delete	Packages	Yes
Edit Delete	Setup & Service Menus	Yes

Enter a **name** into the **Service Menu Category** area. Click **Save** when finished.




Service Menu Category Name

Enter in Name Here


Save Cancel

The **new service menu category** is then displayed with all the other categories.

 **Settings**
 Service Menu Category Names

Division **ReServe Enterprises** ^
 Site **Master List** ^


New
Done

Actions	Name	Defined in Master List
Edit Delete	Beverage Menus	Yes
Edit Delete	Food Menus	Yes
	Imported Menu for Revenue Values	Yes
Edit Delete	Labor	Yes
Edit Delete	Packages	Yes
Edit Delete	Reception Menu 	Yes
Edit Delete	Setup & Service Menus	Yes

⌚
View 1 - 7 of 7
Page 1 of 1 50


Deleting Service Menu Categories

To **delete a Service Menu Category**, follow the same steps as above until you reach the step where you would press the New button. Instead of pressing this button, **click the Delete link** next to the **category** you wish to remove.

 **Settings**
 Service Menu Category Names

Division **ReServe Enterprises** ^
 Site **Master List** ^

New
Done


Actions	Name	Defined in Master List
Edit Delete	Beverage Menus	Yes
Edit Delete	Food Menus	Yes
Edit Delete	Labor	Yes
Edit Delete	Packages	Yes
Edit Delete	Setup and Service - Celebration Event Rental Items	Yes
Edit Delete 	Setup & Service Menus	Yes

⌚
View 1 - 6 of 6
Page 1 of 1 50

Done

Editing Service Menu Categories

To **edit a Service Menu Category**, click the **Edit link** next to the **category** you wish to change.

 **Settings**
 Service Menu Category Names

Division ReServe Enterprises ^
 Site Master List ^

New
Done

Actions	Name	Defined in Master List
Edit Delete	Beverage Menus	Yes
Edit Delete	Food Menus	Yes
Edit Delete	Labor	Yes
Edit Delete	Packages	Yes
Edit Delete	Setup and Service - Celebration Event Rental Items	Yes
Edit Delete	Setup & Service Menus	Yes

⌂
Page 1 of 1
50
View 1 - 6 of 6

Done

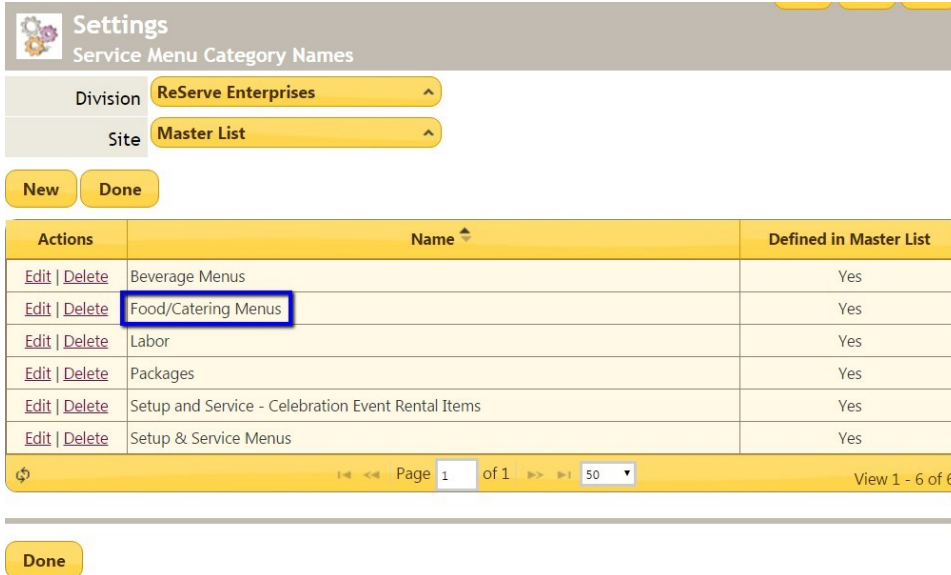
You will be brought to the **edit screen** where you can change the name or spelling of the **Service Menu Category**. Press **Save** when finished.

 **Settings**
 Edit Service Menu Category Name

Service Menu Category Name

Save
Cancel

The updated **Service Menu Category name** is displayed with the other **categories**, and all **service menus** that had the **original category name** will be updated with the **new category name**.



Settings
Service Menu Category Names

Division: **ReServe Enterprises** ^
Site: **Master List** ^

New **Done**

Actions	Name ^	Defined in Master List
Edit Delete	Beverage Menus	Yes
Edit Delete	Food/Catering Menus	Yes
Edit Delete	Labor	Yes
Edit Delete	Packages	Yes
Edit Delete	Setup and Service - Celebration Event Rental Items	Yes
Edit Delete	Setup & Service Menus	Yes

Page 1 of 1 | 50 | View 1 - 6 of 6

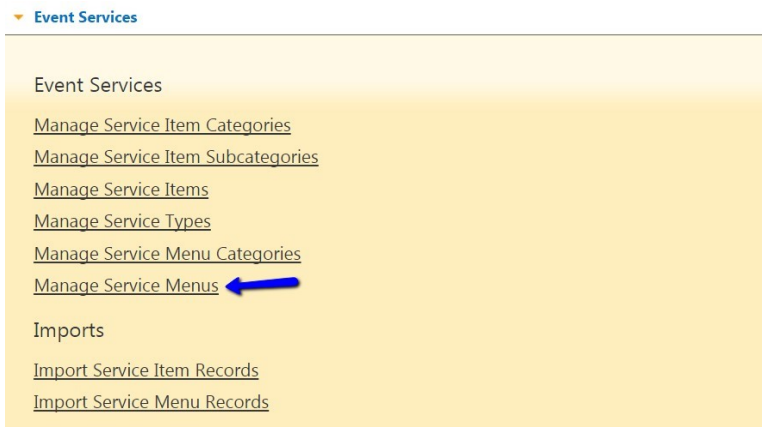
Done

Manage Service Menus

Service Menus are made up of several components: **Service Types**, **Service Items** and **Pricing Types**. Each **menu** must **include at least one Service Type** (a titled grouping for service items). Each **Service Type** can hold as many **Service Items** as you want. **Menus** can be priced in several different ways, and there will be more details below.

Creating New Service Menus

To establish a Service Menu, navigate to Event Services as previously shown, and then **click Manage Service Menus**.



Event Services


- [Manage Service Item Categories](#)
- [Manage Service Item Subcategories](#)
- [Manage Service Items](#)
- [Manage Service Types](#)
- [Manage Service Menu Categories](#)
- [Manage Service Menus](#) ←

Imports

- [Import Service Item Records](#)
- [Import Service Menu Records](#)

Note: Multi-site Organizations, with site specific service menus that are not shared across their organization, will want to add and/or edit service menus within the appropriate site(s). Multi-site Organizations whose service menus ARE shared across all sites will want to add and/or edit service menus within the Master List. Organizations with a single site will want to add/edit service menus where they see the 'edit' link available next to the existing service menus. This could be at the Master or Site level.

Click the New button.

 **Settings**
Service Menu

Division ReServe Enterprises ^

Site Master List ^

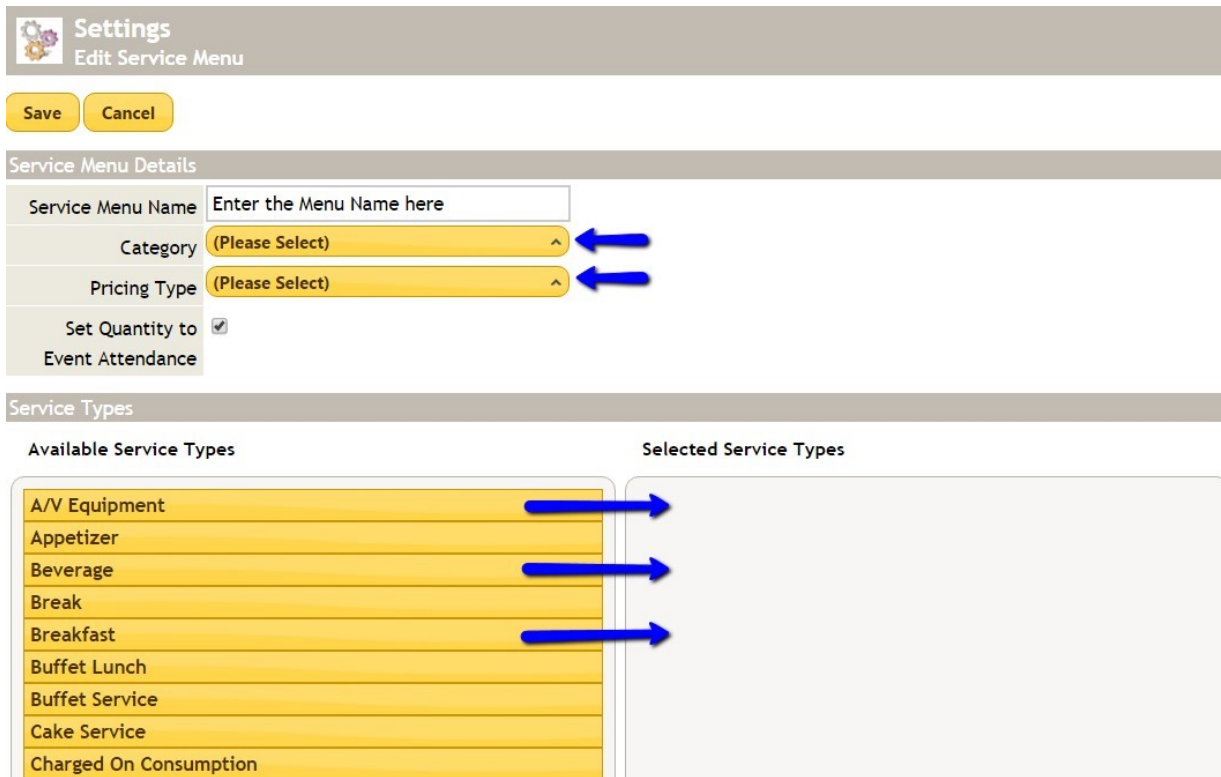
Search String

Category Show All ^

New
Done

Actions	Name <small>↑</small>	Category	Pricing Type	Package Price	Package Cost	Defined in Master List
Copy Edit Delete	Beverage Package (Service for 1 Hour)	Beverage Menu	Package Pricing - Dollar Amount Allocation	\$10.00	\$0.00	Yes
Copy Edit Delete	Beverage Package (Service for 3 Hours)	Beverage Menu	Package Pricing - Dollar Amount Allocation	\$20.00	\$5.00	Yes
Copy Edit Delete	Beverage Package (Service for 4 Hours)	Beverage Menu	Package Pricing - Dollar Amount Allocation	\$25.00	\$10.00	Yes

You will now be taken to the screen where you can start **creating a Service Menu**. You will need to **enter in a Service Menu Name, choose a Category and choose a Pricing Type**. Pricing types include **A La Carte Pricing, Package Pricing - Dollar Amount Allocation and Package pricing - Percentage Amount Allocation**. **Drag and drop Service Types** from the list of **Available Service Types** to the **Selected Service Types** area. Be sure to drag them in the order you would like them to appear on your menu.



Settings
Edit Service Menu

Save Cancel

Service Menu Details

Service Menu Name

Category (Please Select) ^

Pricing Type (Please Select) ^

Set Quantity to Event Attendance

Service Types

Available Service Types	Selected Service Types
A/V Equipment	
Appetizer	
Beverage	
Break	
Breakfast	
Buffet Lunch	
Buffet Service	
Cake Service	
Charged On Consumption	

A La Carte Pricing: Each item within the menu is priced individually.

Package Pricing - Dollar Amount Allocation: The menu is priced as a whole, either per package or per person, and the prices are allocated to each revenue center using exact dollar amounts.

Package Pricing - Percentage Amount Allocation: The menu is priced as a whole, either per package or per person, and the prices are allocated to each revenue center using percentage amounts.

*The difference between dollar amount and percentage amount allocation is that if you choose percentage amount allocation, then if the package price is ever changed, Banquets will automatically recalculate the allocation of money based on the percentage amounts. If dollar amount allocation is chosen and the package price is changed, the user must recalculate all the math themselves to distribute the pricing amongst the revenue centers.

A completed **Service Menu** might look like this. **Click Save** when finished.

Save **Cancel**

Service Menu Details

Service Menu Name	Brunch Menu
Category	Food Menus ^
Pricing Type	Package Pricing - Percentage Amount Allocation ^
Set Quantity to Event Attendance	<input checked="" type="checkbox"/>

Package Pricing Details


Package Pricing	Per Person ^
Package Price	\$15.00
Package Cost	\$0.00

Please enter the percentage amount for each revenue center. The total of all rates must add up to 100%.

Revenue Center	Rate (%)	Applied Rates
Food	100.0000 %	Sales Tax Only ^
Beverage: Alcoholic	0.0000 %	Service Charge and Sales Tax ^
Beverage: Non Alcoholic	0.0000 %	Service Charge and Sales Tax ^
Equipment	0.0000 %	Sales Tax Only ^
Labor	0.0000 %	NO Service Charge or Sales Tax ^
Room Rental	0.0000 %	Sales Tax Only ^
Rentals	0.0000 %	Sales Tax Only ^
Parking	0.0000 %	Sales Tax Only ^

*For the purposes of this example, we created a Brunch Menu with Package Pricing – Percentage Amount Allocation that is priced per person. 100% of our revenue is being allocated to the Food Revenue Center.

After saving, you will be taken to this screen where you can add items to the menu. Click the Add Items button under the Service Type (grey headers) you would like it to appear under. You will be taken to the Master List of items where you will be able to search for whichever item you need.

 **Service Menu**
Brunch Menu

Edit Menu Done

Service Menu Details

Service Menu Name	Brunch Menu
Category	Food Menus
Pricing Type	Package Pricing - Percentage Amount Allocation
Package Pricing	Per Person
Package Price	\$15.00

Beverage

Add Items Edit Items Reorder Items Change Service Type

Actions	Name	Description	A La Carte Price	Add-On Price	# Required	Per # Guests	Revenue Center	Category	Subcategory
⌂ Page 1 of 0 25 No records to view									


Entree

Add Items Edit Items Reorder Items Change Service Type

When you finished adding all of the items to your menu, **click Done**. The **menu** is now able to be added to a function.

Deleting Service Menus

To **delete a Service Menu**, follow the same steps as above until you reach the step where you would click the New button. Instead of pressing this button, **click the Delete link** next to the **menu** you wish to **remove**.

 **Settings**
Service Menus

Division ReServe Enterprises Search String

Site Master List Category Show All

New Done

Actions	Name	Category	Pricing Type	Package Price	Package Cost	Defined in Master List
Copy Edit Delete	Beverage Package (Service for 1 Hour)	Beverage Menus	Package Pricing - Dollar Amount Allocation	\$10.00	\$0.00	Yes
Copy Edit Delete	Beverage Package (Service for 3 Hours)	Beverage Menus	Package Pricing - Dollar Amount Allocation	\$20.00	\$5.00	Yes
Copy Edit Delete	Beverage Package (Service for 4 Hours)	Beverage Menus	Package Pricing - Dollar Amount Allocation	\$25.00	\$10.00	Yes

Editing Service Menus

To **edit a Service Menu**, click the **Edit link** next to the **Menu** you wish to change.

 **Settings**
Service Menus

Division ReServe Enterprises ^

Site Master List ^


Search String

Category Show All ^

New Done

Actions	Name	Category	Pricing Type	Package Price	Package Cost	Defined in Master List
Copy Edit Delete	Beverage Package (Service for 1 Hour)	Beverage Menu	Package Pricing - Dollar Amount Allocation	\$10.00	\$0.00	Yes
Copy Edit Delete	Beverage Package (Service for 3 Hours)	Beverage Menu	Package Pricing - Dollar Amount Allocation	\$20.00	\$5.00	Yes
Copy Edit Delete	Beverage Package (Service for 4 Hours)	Beverage Menu	Package Pricing - Dollar Amount Allocation	\$25.00	\$10.00	Yes
Copy Edit Delete	Breakfast Menu	Food/Catering Menu	A La Carte Pricing	N/A	N/A	Yes

You will be taken to this screen first where you can **edit the menu's name, pricing and service types**. Click **Save** when finished to **edit items** within the **menu**.

 **Settings**
Edit Service Menu

Save Cancel

Service Menu Details

Service Menu Name

Category Food/Catering Menu ^

Pricing Type A La Carte Pricing ^

Set Quantity to Event Attendance

Service Types

Available Service Types

- Appetizer
- Beverage - Alcoholic
- Break
- Breakfast

Selected Service Types

- Beverage - Alcoholic Delete
- Breakfast Delete

After saving, you will be taken to this screen where you can make several edits to the components within the menu.

Service Menu
Breakfast Menu

Edit Menu
Done

Service Menu Details

Service Menu Name	Breakfast Menu
Category	Food/Catering Menus
Pricing Type	A La Carte Pricing
Package Pricing	N/A
Package Price	N/A

Beverage - Alcoholic

Add Items
Edit Items
Reorder Items
Change Service Type

Actions	Name	Description	A La Carte Price	Add-On Price	# Required	Per # Guests	Revenue Center	Category	Subcategory
Delete	Soft Drinks		\$0.00	\$0.00	1.00	1	Beverage: Non Alcoholic		
Delete	Mineral Waters		\$0.00	\$0.00	1.00	1	Beverage:		

Click the Edit Items button to change item pricing, calculate auto quantity and quantity precision.

Click the Reorder Items button to change the order the items are listed in under the service type.

Click the Change Service Type button to change the named grouping that the service item is listed under.

When you have finished, **click Done.**

FAQs

Q: What is the best way to set pricing, so that I do not have to manually recalculate allocated amounts every time we change the price of an overall package.

A: Use the **Package Pricing - Percentage Amount Allocation**. Once %'s are established, as prices change, system will automatically recalculate proper revenue allocations based on services required.

Q: What is the best way to determine profitability on the event items?

A: Ensure to enter a **Cost** as well as a **Price** to the event menu to assist in calculating profitability.

Q: How many **Service Item Categories** can we have?

A: You can have as many **Service Item Categories** that you would like.

Q: What is the purpose of **Service Item Categories**?

A: **Service Item Categories** allow you to organize your **service items** and easily **search for items** by **filtering by category**.

Best Practices

1. Ensure all Event Services utilized in an Event are set up in the system as Event Items, categorized appropriately, and consistently utilized to ensure appropriate billing, and profitability calculations can be effectively maintained.
2. Create **Service Item Categories** based on how you think **Service Items** should be organized.