Caterease Training Syllabus v12.5

Day 1

Morning Session

The morning session on Day One explores several different approaches to adding a new event. When this session is done, students will be able to:

- *Book a new event from Event Manager*
- *Retrieve menu items for an event from pre-exisiting menus*
- *Add custom menu items by hand*
- *Copy menu items from one event to another*
- *Add shifts and staff to an event*
- *Include special requests or comments for an event, optionally copying them from the Scratch Pad*
- *Print and e-mail a contract*
- *Book a new event using the Event Wizard tool*

I. Class Introductions

II. Event Manager Introduction
  A. Reviewing the Event Display
    1. General Details
    2. Notes
  B. Reviewing the Sub-Event Display
    1. Introducing the “Sub-Event” Concept: Menu, Venue, Time
    2. Introducing the Food/Service Tab
  C. Retrieving Menu Items
  D. Printing and E-mailing a Contract

III. Using the Navigation Tools
  A. Introducing the Navigation Bar
  B. Using the Event Finder Tool
  C. Using the Go-To Tool

IV. Booking a New Event Using the Event Wizard
  A. Selecting an Account/Customer
  B. Entering Basic Event Details
    1. Using Data-Entry Tools (Quickpicks, Calendar, Time Wizard)
    2. Entering Banquet Room Details
    3. Entering Delivery Details (Off-Premise Caterers)
    4. Entering Site Location

C. Retrieving Menu Items
   1. Double-Clicking Individual Items
   2. Dragging and Dropping Items
   3. Clicking “Select Items” or “OK”
D. Printing and E-mailing a Contract

V. Morning Break

VI. Adding Staffing to an Event
   A. Adding Shifts to an Event
   B. Adding Staffing to an Event
   C. Copying Event Comments from the Scratch Pad

VII. Modifying a New Event from Event Manager
   A. Adding a New Sub-Event
      1. Editing General Sub-Event Information
      2. Using the Time Wizard
      3. Selecting a Banquet Room
      4. Copying Notes from the Scratch Pad
      5. Entering Off-Premise Information
   B. Entering Menu Items
      1. Retrieving Items from Menus
      2. Adding Custom Menu Items by Hand

VIII. Advanced Menu Features
   A. Inserting Menu Items
   B. Retrieving Menu Packages
   C. Adding and Modifying Menu Item Descriptions
   D. Adding Unique Menu Items to an Event by Hand
   E. Customizing the Event Manager Food/Service Tab
   F. Copying Menus from Event to Event
   G. Generating an Ingredients List and a Required Item List

IX. Lunch Break

caterease
catering + event planning solution

Caterease Training Syllabus v.12.5

Day 1

Afternoon Session

The afternoon session on Day One begins with a couple of additional event booking options, then focuses on creating and managing accounts (customers), and finally moves on to customizng screen displays. The day ends with a discussion of some advanced event management tools. When this session is done, students will be able to:

- *Book a new event from the Scheduler*
- *Add a new client in Account Manager*
- *Use several advanced account tools*
- *Add a new account using the Event Wizard*
- *Generate account prints and reports*
- *Redesign various screen displays throughout the program*
- *Use several advanced event tools*

I. Booking a New Event from the Scheduler
   A. Introduction to the Scheduler
   B. Opening the Scheduler
   D. Changing the Scheduler Views (Day, Week, Workweek, Month)
   E. Grouping the Scheduler
   F. Adding Notes to the Scheduler
   G. Retrieving Events from the Scheduler
   H. Displaying Sub-Events in the Scheduler
   I. Changing Grouping in the Sub-Event Calendar
   J. Modifying Event Information
   K. Accessing the Event Wizard from the Sub-Event Calendar
      1. Selecting an Account for the New Event
      2. Entering Basic Event Details
      3. Continuing on to Select Menu Items

II. Adding a New Account (Account Manager)
   A. Adding A New Account
   B. Using the General Tab
   C. Using the Miscellaneous Tab
   D. Adding New Contact People to an Account
   E. Adding a New Customer Who is Not a Company
   F. Adding a New Event from Account Manager

caterease
catering + event planning solution

III. Advanced Account Management
- A. Deleting an Account
- B. Viewing/Editing Contact Details
- C. Viewing/Editing Events from Account Manager
- D. Generating a Consolidated Billing Statement
- E. Generating Account Reports
- F. Account Manager Tools
  1. Posting Payments to an Account
  2. Combining Duplicate Accounts
  3. Creating a Default Site Location

IV. Adding a New Account (Event Wizard)
- A. Entering General Details
- B. Entering Miscellaneous Details
- C. Adding a New Contact Person

V. Afternoon Break

VI. Customizing Screen Displays
- A. Customizing Manager Screens
  1. Adding/Removing Fields from the Screen
  2. Customizing the Screen Display in Event Manager
  3. Adding or Removing Client/Organization or Financial Details
  4. Customizing the Sub-Event Display
  5. Customizing the Sub-Event Screen Layout
- B. Customizing the Event Wizard
  1. Customizing the Event Wizard Display
  2. Creating a Custom Layout

VII. Using Event Manager Tools
- A. Creating an Event Checklist
- B. Creating an Event Timeline
- C. Viewing/Modifying Event Tax/Service Charge Rates
- D. Getting Driving Directions
- E. Adding Event Payments
- F. Scheduling Future Deposits
- G. Using a Regular Deposit Schedule
- H. Creating a Required Items List
- I. Using Event-Related Files
- J. Applying Event Discount Rates
- K. Managing Multiple Events Simultaneously
- L. Copying an Event
- M. Switching/Editing Account Information

Caterease Training Syllabus v.12.5

Day 2

Morning Session

After Day One's focus on getting information into the program, the morning session on Day Two explores several powerful tools and reports to get that information back out again. When this sesssion is done, students will be able to:

- *Track all current events and accounts receivable*
- *Build custom results grids for reporting*
- *Print and/or export grid data*
- *Print a batch of multiple prints with one mouse click*
- *E-mail a batch of clients simultaneously*
- *Review information in Chart View format*
- *Build a custom event query*
- *Run a variety of quick-access reports*
- *Take advantage of Caterease add-ins, including Prospect Manager, Contact Manager, and Marketing Tools*

I. Finding Current Events and Accounts Receivable
   A. Running a Current Events Query
   B. Customizing the Results Grid
   C. Sorting and Grouping Grid Data
   D. Saving the Grid View
   E. Creating and Saving Grid Filters
   F. Printing/Exporting Grid Data
   G. Generating Prints, Reports, and Batch Prints
   H. Batch E-mailing
   I. Using EZ Chart View and Layout View
   J. Generating the Client Contacts Query
   K. Using the Accounts Receivable Query
   L. Running the Accounts Receivable Report

II. Creating a Custom Event Query
   A. Introducing the Events Query Form
   B. Establishing Query Criteria
   C. Modifying and Saving Queries
   D. Generating Prints from the Query Results Screen

III. Generating Activity Queries and Reports
- A. Running a Food/Service Activity Query
- B. Generating a Food/Service Items Report
- C. Running a Payments Activity Query
- D. Generating a Payments Made Report

IV. Morning Break

V. Prospect Manager Add-In Module Introduction
- A. Using the Prospect Manager Tool
  1. Adding Next Actions and Next Action Dates
  2. Setting a Prospect Status
  3. Establishing a Filter
  4. Saving and Retrieving a Filter
  5. Adding a Proposal
  6. Making a Proposal into an Event
  7. Printing a Proposal

VI. Contact Manager Add-In Module Introduction
- A. Reviewing the Contact Manager Screen
- B. Creating a Reminder in Event Manager
- C. Creating a Contact History Note in Event Manager
- D. Auto-Saving a Contact History Note
- E. Creating Dynamic Auto Reminders
- F. Inserting Merge Fields into an Auto-Reminder Message
- G. Creating Reminders/History Notes in Account Manager
- H. Managing Current Reminders
  1. Setting Days Out View for Reminders
  2. Responding to Reminders
  3. Dismissing Reminders
- I. Viewing Reminders in a Calendar

VII. Marketing Tools Add-In Module Introduction
- A. Accessing the Marketing Tools Form
- B. Adding a New Merge Document
  1. Inserting Images
  2. Inserting Tables
  3. Modifying a Table
  4. Inserting Dynamic Merge Tables
  5. Formatting Text

VIII. Lunch Break

Afternoon Session

I. Using the Print Designer
   A. Accessing the Print Designer
   B. Creating a New Print
   C. Customizing the Header
   D. Inserting Merge Fields
   E. Suppressing Sections in a Print
   F. Customizing Text Blocks in a Print
   G. Formatting Food/Service Items in a Print
   H. Advanced Print Settings
   I. Accessing Other Print Options
   J. Using the Miscellaneous Prints Designer

II. Using Employee Manager
   A. Setting Up Shifts
   B. Assigning Employees to Positions
   C. Establishing Employee Work/Vacation Times

III. Adding New Food/Service Menus to Caterease
   A. Adding New Menus
   B. Adding Menu Items
   C. Creating Menu Packages

IV. Setting Up System Security
   A. Accessing System Security
   B. Establishing the Administrative Password
   C. Adding Caterease Users and Passwords
   D. Establishing Individual Access Rights
   E. Creating User Groups

V. Afternoon Break

VI. Setting Up Your Program
- A. Customizing Quickpick Lists
- B. Customizing Name Fields
- C. Establishing Required Fields
- D. Creating User-Defined Fields
- E. Setting New Booking Defaults
- F. Establishing Default Tax Rates
- G. Establishing a Default Deposit Schedule
- H. Creating a Default Timeline
- I. Configuring Global Settings
- J. Customizing the Scratch Pad
- K. Adding to the Site Locations Database
- L. Creating Banquet Rooms/Setup Styles
- M. Establishing Setup Styles/Capacities/Breakout Rooms
- N. Blocking Banquet Rooms

VII. Using the Backstage Tab
- A. Accessing General Information
- B. Tracking Information with the Dashboard
- C. Reviewing Recently Changed Events
- D. Getting Documentation and Support
- E. Sending User-to-User Instant Messaging

VIII. Q & A