Caterease Onsite Training Syllabus

Day 1 – Morning

Morning Session – Booking and Editing Events

During this first morning session, we will discuss all of the details of booking an event – from choosing a customer to building a menu to emailing a print.

Note: We will use a training database so the entire team can follow the various in-class exercises, and also to avoid adding garbage data to your live Caterease program.

TOPICS COVERED

I. Event Manager Introduction
   A. Reviewing the Event Display
   B. Searching For Existing Events
   C. Reviewing the Sub-Event (Meal) Display
   D. Retrieving Menu Items

II. Booking a New Event Using the Event Wizard
   A. Selecting an Account/Customer
   B. Entering Basic Event Details
   C. Choosing an Event Wizard Layout
   D. Retrieving Menu Items
   E. E-mailing a Contract
   F. Inserting Merge Letters as the Body of an E-mail

III. Morning Break

IV. Managing Staffing, Comments and Additional Sub-Events
   A. Adding Shifts to an Event
   B. Adding Staffing to an Event
   C. Copying Event Comments from the Scratch Pad
   D. Adding a New Sub-Event or Meal

V. 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
   H. Editing General Details: Notes and Contact Person

VI. Lunch Break

Caterease Onsite Training Syllabus
Day 1 – Afternoon

Afternoon Session – Using the Calendar, Managing Customers, Event Tools

In the afternoon session on Day One, we will discuss managing existing parties and booking new ones from the event calendar, and then turn our focus to creating and managing accounts (customers). The day ends with a discussion of some advanced event management tools.

TOPICS COVERED

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

II. Adding a New Account (Account Manager)
   A. Adding A New Account
   B. Using the General Tab
   C. Filling out 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

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

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

V. Afternoon Break

Caterease Onsite Training Syllabus

Day 1 – Afternoon (Continued)

VI. 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 Onsite Training Syllabus

Day 2 – Morning

Morning Session – Running Queries and Reports, Using Add-In Modules

In the morning of Day Two, we will learn how to track information in the program through the use of reports and custom queries. Even if your company is new to the program, this exercise will help you determine which details are most important as you begin entering information. After this, we will discuss any add-in modules your company might have purchased (Prospect Manager, Contact Manager and Marketing Tools are included here as examples.

Note: We continue to use a training database in this session in order to be able to produce detailed results in the various reports and queries.

TOPICS COVERED

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. Printing/Exporting Grid Data
   F. Creating and Saving Grid Filters
   G. Generating Prints, Reports, and Batch Prints
   H. Batch E-mailing
   I. Using EZ Chart 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. Creating and Saving a Query
   B. Modifying and Saving Custom Queries
   C. Editing Events in a Batch

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

Caterease Onsite Training Syllabus
Day 2 – Morning (Continued)

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. Retrieving a Filter
      4. Adding a Proposal
      5. Printing a Proposal
      6. Copying a Proposal
      7. Making a Proposal into an Event

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 Automatic Reminders
   F. Inserting Merge Fields into an Auto-Reminder Message
   G. Creating Reminders/History Notes in Account Manager
   H. Managing Current 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

VIII. Lunch Break

Caterease Onsite Training Syllabus

Day 2 – Afternoon

Afternoon Session – Setting Up Your Program

Now that you have learned the techniques for adding, editing and tracking information in Caterease, we will focus on setting up your specific program the way you want it. We will begin by customizing your Event Wizard so it reflects the details you need to collect for a party. Then we will adjust your event prints (Print Designer, Marketing Tools), review menus, customize quickpicks and any other custom needs you might have.

Note: During this session, we will obviously be using your program and database. The timeline of this session (break time, etc.) will be flexible to accommodate your needs.

TOPICS COVERED

I. Setting Up Your Program – Including:
   A. Creating a Custom Event Wizard
   B. Creating Custom Event Prints (Print Designer)
   C. Creating Custom Merge Letters and Other Documents (Marketing Tools)
   D. Creating Custom Queries
   E. Adding Shifts and Employees
   F. Modifying Default Menus
   G. Establishing System Security
   H. Customizing Quickpick Lists
   I. Customizing Field Names
   J. Creating User Defined Fields
   K. Setting New Booking Defaults
   L. Establishing Default Deposit Schedules
   M. Creating Default Timelines
   N. Configuring Global Settings
   O. Customizing the Scratch Pad
   P. Adding to the Site Locations Database

II. General Q&A