

CaterEase Regional Training Syllabus – Level 1 Day 1 – Morning

- I. Introducing CaterEase: General Concepts
 - a. Introducing User Information Notifications
 - b. Exploring the Ribbon and Navigation Pane
 - c. Using Data-Entry Tools (Quickpicks, Calendar, Calculator)
 - d. Introducing Event Manager (Including Sub-Event)
 - e. Adding and Deleting Records
 - f. Selecting Records from Preconfigured Lists
 - g. Showing Details with the Magnifying Glass
 - h. Saving or Cancelling Changes

 - II. Booking a New Event Using the Event Wizard
 - a. Choosing a Client and Contact Person
 - b. Filling Out Basic Event Details
 - c. Using the Time Wizard Tool
 - d. Entering Times by Hand and by Using the Time Wizard Tool
 - e. Entering Room Details and Off-Premise Venue Information
 - f. Selecting Menu Items for the New Event
 - g. Emailing the Contract

 - III. Event Booking Exercises
- MORNING BREAK (10:30 A.M. - 10:45 A.M.)**
- IV. Using the Scheduler
 - a. Viewing Events in the Scheduler
 - b. Viewing Event Details and Printing from the Scheduler
 - c. Viewing Events in a Venue Graph
 - d. Adding a New Event from the Scheduler

 - V. Advanced Menu Management
 - a. Adding a Custom Menu Item
 - b. Modifying Menu Item Descriptions and Including Modifications on Prints
 - c. Using the Quick-Item-Insert Feature
 - d. Incrementally Searching for Menu Items

 - VI. Scheduler and Menu Management Exercises

LUNCH (12:00 P.M. - 1:00 P.M.)

CaterEase Regional Training Syllabus – Level 1 Day 1 – Afternoon

- VII. Managing General Event Information
 - a. Reviewing Event Manager Fields
 - b. Searching for Events
 - c. Customizing Quickpick Lists
 - d. Adding/Changing Event Contact People
 - e. Editing an Existing Sub-Event (Meal)
 - f. Adding a New Sub-Event (Meal)
 - g. Selecting Staff for an Event
 - h. Entering Comments by Hand and from the Scratch Pad
 - i. Entering Notes by Hand and from the Scratch Pad
 - j. Using the Mapping Interface
 - k. Managing Multiple Events Simultaneously

- VIII. General Event Management Exercises
 - AFTERNOON BREAK (2:30 P.M.-2:45 P.M.)**

- IX. Copying Events for Repeat Business
 - a. Copying Events to Specific Dates
 - b. Copying Events to Regular Intervals (Weekly, Monthly, Etc.)
 - c. Copying Events to Specific Week Days in a Date Range

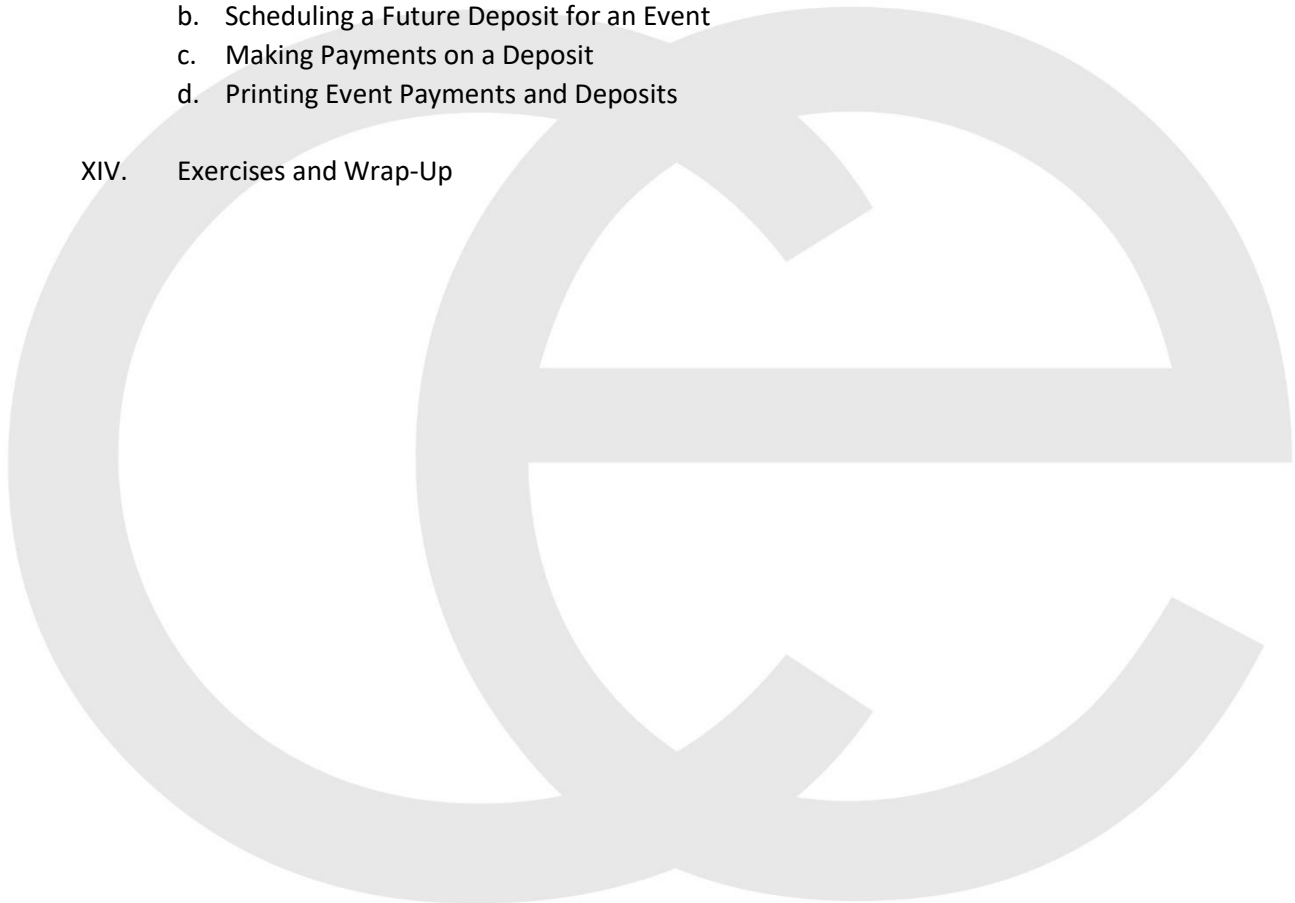
- X. Using the Event Checklist
 - a. Retrieving Items from Default Checklists
 - b. Adding Unique Checklist Items by Hand
 - c. Printing a Checklist for an Event
 - d. Generating the Event Checklist Report
 - e. Reviewing the Checklist Backstage Tab

- XI. Using the Event Timeline
 - a. Retrieving Items from Default Timelines
 - b. Adding Unique Timeline Items by Hand
 - c. Printing a Timeline for an Event
 - d. Showing Event Timelines on Other Prints

- XII. Managing Event Tax and Service Charge Rates
 - a. Editing Tax/Service Charge Rates for an Event
 - b. Selecting an Alternative Tax Schedule for an Event

- XIII. Managing Event Payments and Deposits
 - a. Adding and Editing a Payment for an Event
 - b. Scheduling a Future Deposit for an Event
 - c. Making Payments on a Deposit
 - d. Printing Event Payments and Deposits

- XIV. Exercises and Wrap-Up



CaterEase Regional Training Syllabus – Level 1 Day 2 – Morning

- I. Day One Review and Role Plays
- II. Managing Accounts (Customers)
 - a. Exploring Account Manager
 - b. Searching for Existing Accounts
 - c. Adding an Account in Account Manager
 - d. Adding a Contact Person to an Account
 - e. Editing a Contact Person's Information
 - f. Adding an Account Who is Not a Company
 - g. Adding and Retrieving Events from Account Manager

MORNING BREAK (10:30 A.M.-10:45 A.M.)

- III. Managing Prospective Leads
 - a. Comparing Prospect Manager to Account Manager
 - b. Managing Next Actions and Next Action Dates
 - c. Adding a Proposal
 - d. Filling out the Details Tab
 - e. Printing a Proposal
 - f. Copying a Proposal
 - g. Turning a Proposal into an Event

- IV. Account Manager/Prospect Manager Exercises

LUNCH (12:00 P.M.-1:00 P.M.)

- V. Creating Reminders and History Notes
 - a. Creating Contact History Items in Account Manager and Prospect Manager
 - b. Creating Reminders in Account Manager and Prospect Manager
 - c. Creating a New Reminder from Event Manager
 - d. Creating a New Contact History Note from Event Manager
 - e. Creating a Contact History Note from an Email
- VI. Contact History and Reminder Exercises

Caterease Regional Training Syllabus – Level 1 Day 2 – Afternoon

- VII. Processing Web Inquiries
 - a. Reviewing Web Inquiry Data
 - b. Processing an Inquiry as an Account
 - c. Processing an Inquiry as a Prospect
 - d. Processing an Inquiry as an Event

- VIII. Using the Query Tools to Track Business
 - a. Tracking Current Events
 - b. Customizing Grid Columns
 - c. Filtering Grid Data
 - d. Generating Prints for a Group of Events
 - e. Generating Multiple Prints for One or Several Events
 - f. Sending Batch Emails

- AFTERNOON BREAK (2:30 P.M.-2:45 P.M.)**

- IX. Running Quick-Access Reports
 - a. Generating an Event Sheet
 - b. Showing Details on an Event Master
 - c. Forecasting Revenue for a Date Range
 - d. Showing Upcoming Deposits Due
 - e. Tracking Food/Service Items Ordered for a Date Range
 - f. Running a Weekly Kitchen Plan

- X. Using the Backstage Tab
 - a. Reviewing Data in the Dashboard
 - b. Reviewing Recently Edited Records
 - c. Sending User-to-User Messages
 - d. Contacting Caterease Support

REVIEW EXERCISES (3:15 P.M.-3:45 P.M.)

WRAP-UP/Q&A (3:45 P.M.-4:00 P.M.)