


CaterEase Regional Training Syllabus – Level 2

Day 1 – Morning

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- I. Reviewing the Basics
 - a. Exploring Event Manager
 - b. Exploring Account Manager
 - c. Exploring Prospect Manager

 - II. Using Advanced Scheduler Options
 - a. Using the Range Control
 - b. Grouping the Scheduler
 - c. Filtering the Scheduler
 - d. Establishing Advanced Settings
 - e. Moving the Scheduler Grid

 - III. Working with Grids
 - a. Customizing/Rearranging Columns in a Grid
 - b. Sorting Data in a Grid
 - c. Grouping Data in a Grid
 - d. Saving/Sharing Custom Grid Views
 - e. Filtering Grid Data
 - f. Saving/Sharing Custom Grid Filters
 - g. Saving/Sharing Custom Grid Layouts
 - h. Viewing Grids in a Chart or Graph
 - i. Printing Grids
 - j. Exporting Grid Data
 - k. Batch Processing
 - l. Building Custom Queries
 - m. Using Advanced Queries and Reports
 - n. Using Grids in Managers

 - IV. Customizing Toolbars/Screens
 - a. Customizing Toolbars
 - b. Quick-Layout Customizing
 - c. Viewing the Customize Window
 - d. Saving/Sharing Window Settings
 - e. Saving/Sharing Layouts
 - f. Creating Multiple Event Wizard Layouts

CaterEase Regional Training Syllabus – Level 2

Day 1 – Morning, Continued

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

- V. Grid Exercises
- VI. Setting Up Default Menus
 - a. Managing Item Inventory
 - b. Establishing Minimum, Default, and Linked Quantities
 - c. Applying a Base Price Markup
 - d. Customizing Item Types
 - e. Copying Menus in Menu Manager
 - f. Setting Up Automatic Menu Packages
 - g. Using the New Food/Service Window in Event Manager
 - h. Using Expanded View in Event Manager
 - i. Printing Item Labels
- VII. Menu Exercises

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

CaterEase Regional Training Syllabus – Level 2 Day 1 – Afternoon

- VIII. Building Ingredients Lists
 - a. Adding an Ingredient List Category
 - b. Adding an Ingredient Items
 - c. Building Sub-Recipes
 - d. Creating Item-Specific Units
 - e. Creating Custom General Units
 - f. Assigning Ingredients to Menu Items
 - g. Modifying Ingredients in an Event


 - IX. Building Required Items List
 - a. Adding a Required Item List Category
 - b. Adding a Required Item
 - c. Inventorying Required Items
 - d. Assigning a Required Item Cost and Packing Unit
 - e. Assigning Required Items to Menu Items
 - f. Modifying Required Items in an Event

 - X. Ingredients/Required Items Exercises
- AFTERNOON BREAK (2:30 P.M.-2:45 P.M.)**
- XI. Managing Scheduled Items
 - a. Renaming Items for Scheduling
 - b. Creating a Default List of Items
 - c. Selecting Scheduled Items for an Event
 - d. Viewing and Managing Scheduled Items in the Scheduler

 - XII. Creating Automatic Change Notifications
 - a. Setting Up Automatic User Notifications
 - a. Establishing a Custom Filter
 - b. Viewing and Managing Notifications
 - c. Enabling and Disabling Notifications
 - b. Using the Notifications Backstage Tab

CaterEase Regional Training Syllabus – Level 2

Day 1 – Afternoon, Continued

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- XIII. Using the Audit Trail
 - a. Enabling the Audit Trail
 - b. Printing an Audit Trail for One Event
 - c. Generating an Audit Trail Report for a Date Range

 - XIV. Account Manager
 - a. Apply Default Allergy Information
 - b. Combining Duplicate Accounts
 - c. Assigning Master Accounts
 - d. Importing Account Lists
 - e. Importing Event Details

 - XV. Establishing System Security
 - a. Enabling System Security
 - b. Adding a New User
 - c. Establishing User Security Settings
 - d. Creating User Groups

CaterEase Regional Training Syllabus – Level 2 Day 2 – Morning

- II. Customizing Prints/Miscellaneous Prints
 - a. Accessing Print Designer
 - b. Adding a New Print
 - c. Selecting a Print Layout
 - d. Editing the Header or Footer of a Print
 - e. Selecting Fields on the Print
 - f. Customizing and Suppressing General Information
 - g. Editing Top and Bottom Notes Sections
 - h. Changing Print Fonts
 - i. Grouping Information on Prints
 - j. Copying Prints
 - k. Accessing Prints in Miscellaneous Prints Designer

- III. Creating Customer Merge Documents
 - a. Adding a New Merge Document
 - b. Adding Merge Fields to a Document
 - c. Using Formatted Date Fields
 - d. Inserting a Table into a Document
 - e. Using Merge Tables to Insert Menu Items, Payments, Etc.
 - f. Using Nested Tables to Arrange Information in a Document
 - g. Using Merge Formulas

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

- IV. Custom Print Exercises

- V. Creating Email Templates
 - a. Building an Email Template
 - b. Saving Custom Templates

- VI. Using the Print Selection Tool
 - a. Generating Prints from the Print Selection Tool
 - b. Modifying Event Sub-Prints On-the-Fly
 - c. Generating a Print for Selected Sub-Events
 - d. Generating Multiple Prints Simultaneously

CaterEase Regional Training Syllabus – Level 2 Day 2 – Morning, Continued

- VII. Reviewing Cost/Profit of an Event
 - a. Reviewing the Event Costing Summary
 - b. Changing Line Item Costs
 - c. Applying Discounts to a Party

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

CaterEase Regional Training Syllabus – Level 2 Day 2 – Afternoon

- VIII. Using the Event Timeline
 - a. Setting Up Default Timeline Lists
 - b. Establishing a Timeline for a Party
 - c. Setting Times for Individual Menu Items
 - d. Printing an Event Timeline
 - e. Modifying the Timeline Print
 - f. Adding the Timeline to the Contract

- IX. Using the Event Checklist
 - a. Setting Up a Default Checklist
 - b. Establishing a Checklist for a Party
 - c. Printing an Event Checklist
 - d. Modifying the Checklist Print
 - e. Running a Checklist Report
 - f. Reviewing the Checklist Backstage Tab

- X. Timeline and Checklist Exercises

- Afternoon Break (2:30 P.M.-2:45 P.M.)**

- XI. Scheduling Future Deposits for a Party
 - a. Adding Scheduled Event Deposits
 - b. Creating Default Conditional Deposit Schedules
 - c. Setting the Program to Update Deposits Due Automatically
 - d. Including Deposits on the Contract
 - e. Running a Deposits Due Report

- XII. Managing Staff for Events
 - a. Creating Default Shifts or Positions
 - b. Establishing Shift Rules
 - c. Adding Employees
 - d. Assigning a Position to an Employee
 - e. Setting Employee Work Schedules and Vacations
 - f. Customizing the Shift and Employee Grids

CaterEase Regional Training Syllabus – Level 2 Day 2 – Afternoon, Continued

- g. Printing a Staffing Sheet for an Event
 - h. Printing a Scheduled Shifts Report
 - i. Printing an Employee Staffing Schedule
- XIII. Using the CEC Mobile App
- a. Creating the List of App Users
 - b. Finding and Downloading the App
 - c. Using the App Tools
- XIV. Reviewing Information in the Browser Dashboard
- a. Accessing/Logging into the Dashboard
 - b. Using the Items Tab (Sorting Data)
 - c. Using the Events Tab (Filtering, Grouping, and Exporting Data)
 - d. Using the Clients Tab (Viewing Charts and Graphs)