Caterease Regional Training Syllabus – Level 1
Day 1 – Morning

I. Introducing Caterease: General Concepts
   a. Introducing Caterease User Information Notifications
   b. Sending User-to-User Instant Messages
   c. Exploring the Ribbon and Navigation Pane
   d. Introducing Event Manager (Including Sub-Event)
   e. Using Data-Entry Tools (Quickpicks, Calendar, Calculator)
   f. Adding and Deleting Records
   g. Selecting Records from Pre-Set
   h. Showing Details with the Magnifying Glass
   i. Saving or Cancelling Changes
   j. Accessing Context-Sensitive Help

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

III. Event Booking Exercises

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

IV. Using the Calendar of Events (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
- c. Including Modifications on Prints
- d. Using the Quick-Item-Insert Feature
- e. Incrementally Searching for Menu Items
- f. Copying Menu Items from Event to Event

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.   Copying Menu Items from Event to Event Managing General Event Information
   a. Reviewing Event Manager Fields
   b. Searching for Events
   c. Customizing Quickpick Lists
   d. Adding/Changing Event Contact People
   e. Adding a Sub-Event
   f. Editing an Existing 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

Caterease Regional Training Syllabus – Level 1
Day 1 – Afternoon (Continued)

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
- a. Adding a Payment for an Event
- b. Editing an Existing Payment
- c. Sending a Credit Card Payment Link
- d. Printing Event Payments

XIV.   Exercises and Wrap-Up

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. Reviewing Account Manager Fields
   e. Adding or Editing Contact 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. Copying a Proposal
   e. 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

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

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

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

5.21.MG