CATEREASE

Caterease Onsite Training Syllabus

Day 1 – Morning

Morning Session

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. Entering General Event Information
   B. Searching for Events
   C. Reviewing and Editing Sub-Event (Meal) Information
   D. Selecting Event Menu Items from Default Menus

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

III. Using the Scheduler
   A. Viewing Events in the Scheduler
   B. Grouping the Calendar
   C. Filtering the Calendar
   D. Using the Calendar Grid
   E. Adding a Note to the Calendar
   F. Viewing Events in a Venue Graph
   G. Adding a New Event from the Scheduler

IV. Advanced Menu Management
   A. Adding a Custom Menu Item
   B. Retrieving Menu Item Packages
   C. Modifying Menu Item Descriptions
   D. Separating Menu Items Based on Type
   E. Including Menu Item Modifications on Prints
   F. Using the Quick Item Insert Feature
   G. Incrementally Searching for Menu Items
   H. Managing Event Required Items

Caterease Onsite Training Syllabus

Day 1 – Morning (Continued

V. Entering General Event Information
   A. Reviewing Event Manager Fields
   B. Adding/Changing Event Contact People
   C. Adding a New Sub-Event (Meal)
   D. Using the Time Wizard
   E. Using the Mapping Interface
   F. Managing Multiple Events Simultaneously

VI. Reviewing Cost/Profit of an Event
   A. Reviewing the Event Costing Summary
   B. Changing Line Item Costs
   C. Applying Discounts to a Party

Caterease Onsite Training Syllabus
Day 1 – Afternoon

Afternoon Session

TOPICS COVERED

I. Entering General Notes and Comments for an Event
   A. Setting Up the Program's Scratch Pad
   B. Entering Comments for an Event
   C. Entering General Notes for an Event
   D. Copying Notes/Comments from Scratch Pad
   E. Having Notes/Comments Appear on the Contract

II. Copying Sub-Events, Menus and Events
   A. Copying Sub-Events (or Meals)
   B. Copying Menus from One Event to Another
   C. Copying Events

III. 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

IV. 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

V. Managing Event Tax and Service Charge Rates
   A. Establishing Default Tax/Service Charge Rates
   B. Creating Multiple Tax Schedules
   C. Renaming Tax/Service Charge/Gratuity Names
   D. Managing Tax Rates for an Event

Caterease Onsite Training Syllabus

Day 1 – Afternoon (Continued)

VI. Managing Event Payments
   A. Adding a Payment for an Event
   B. Editing an Existing Payment
   C. Including Payments on the Contract/Invoice
   D. Running a Payments Made Report

VII. Scheduling Future Deposits for a Party
   A. Scheduling Future Event Deposits
   B. Making Payments on a Deposit
   C. Adding Scheduled Event Deposits
   D. Creating Default Conditional Deposit Schedules
   E. Setting the Program to Update Deposits Due Automatically
   F. Including Deposits on the Contract
   G. Running a Deposits Due Report

VIII. Attaching an External File to an Event
   A. Attaching a Related File to an Event
   B. Replacing an Existing Related File
   C. Attaching a Caterease Print to an Event

IX. Customizing Tools
   A. Customizing the Tools Menu
   B. Customizing the Tool Bar

Caterease Onsite Training Syllabus

Day 2 – Morning

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

In the morning of Day Two, we will learn how to track information in the program through the use 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. Managing Accounts (Customers)
   A. Searching for Existing Accounts
   B. Adding an Account in Account Manager
   C. Adding an Account Who is Not a Company
   D. Adding and Retrieving Events from Account Manager
   E. Assigning a Default Payment Method to an Account
   F. Assigning a Default Site Location to an Account
   G. Combining Duplicate Accounts
   H. Printing a Consolidated Billing Statement

II. Managing Prospective Leads
   A. Adding a New Prospect in Prospect Manager
   B. Creating Next Actions and Action Dates
   C. Setting a Prospect Status
   D. Establishing a Filter in Prospect Manager
   E. Creating a Prospect Proposal
   F. Printing a Prospect Proposal
   G. Copying a Proposal
   H. Creating an Event from a Proposal

Caterease Onsite Training Syllabus
Day 2 – Morning (Continued)

III. Creating Reminders and History Notes
   A. Creating Contact History Items in Prospect Manager
   B. Creating Reminders in 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
   F. Creating Automatic Reminders
   G. Retrieving Linked Reminders into a Manager
   H. Viewing Contact History and Reminders in Event Manager
   I. Viewing Reminders in the Scheduler

IV. Using the Query Tools to Track Business
   A. Tracking Current Events
   B. Customizing Results Grids
   C. Grouping Grid Data
   D. Saving and Loading Custom Grid Views
   E. Filtering Grid Data
   F. Saving and Loading Custom Grid Filters
   G. Saving and Loading Custom Grid View Layouts
   H. Using the Find Panel
   I. Using the Preview Field
   J. Exporting Grid Data
   K. Printing Grids
   L. Generating Batch Emails

V. Managing Staff for an Event
   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. Selecting and Managing Staff for an Event
   G. Managing Event Shifts
   H. Customizing the Shift and Employee Grids
   I. Printing a Staffing Sheet for an Event
   J. Printing a Scheduled Shifts Report
   K. Printing an Employee Staffing Schedule

VI. 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

VII. Setting Up Your Program – Including:
- A. Customizing Quickpick Lists
- B. Creating and Displaying User Defined Fields
- C. Changing the Names of Fields
- D. Establishing Required Fields
- E. Setting New Booking Defaults
- F. Creating a Custom Event Wizard
- G. Creating Custom Event Prints (Print Designer)
- H. Creating Custom Merge Letters and Other Documents (Marketing Tools)

VIII. Creating Automatic Change Notifications
- A. Setting Up Automatic User Notifications
- B. Establishing a Custom Filter
- C. Viewing and Managing Notifications
- D. Enabling and Disabling Notifications
- E. Using the Notifications Backstage Tab

IX. Managing Default Menus
- A. Adding a New Menu or Sub-Menu
- B. Copying an Existing Menu
- C. Adding Items to a Menu or Sub-Menu
- D. Creating a Description, Label, Notes or Image for an Item
- E. Editing Additional Menu Item Details
- F. Creating an Automatic Menu Item Package
- G. Making Changes to Menu Items in Batch

Caterease Onsite Training Syllabus

Day 2 – Afternoon (Continued)

X. Establishing System Security
   A. Enabling System Security
   B. Adding a New User
   C. Establishing User Security Settings

XI. Setting Up Banquet Rooms and Site Locations
   A. Adding a Master List of Setup Styles
   B. Adding Banquet Rooms
   C. Establishing Setup Styles and Capacities for a Room
   D. Establishing Breakout Rooms for a Room
   E. Entering Site Locations into the Site Locations Database
   F. Displaying Additional Site Location Fields

XII. Using Tablet View
   A. Enabling Tablet View
   B. Setting Up the Tablet

XIII. Wrap Up and Q&A