

## 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 Tab and Navigation Pane
  - d. Using Data-Entry Tools (Quickpicks, Calendar, Calculator)
  - e. Introducing Event Manager (Including Sub-Event)
  - f. Adding and Deleting Records
  - g. Selecting Records from Pre-Set Lists
  - h. Showing Details Using 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. Using the Account Finder Tool
  - c. Adding a New Account for the New Event
  - d. Filling Out Basic Event Details
  - e. Entering Times by Hand and by Using the Time Wizard Tool
  - f. Entering Room Details and Off-Premise Venue Information
  - g. Entering Food/Service Items
  - h. E-mailing 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. Generating Event Prints Directly from the Scheduler
  - c. Generating Multiple Prints Simultaneously
  - d. Using a Venue Graph
  - e. Adding an Event from the Scheduler

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

- V. Advanced Menu Management
  - a. Adding a Custom Food/Service Item to an Event
  - b. Modifying an Item’s Default Description, Instructions, or Other Details
  - c. Including Food/Service Item Modifications on Prints
  - d. Using the Quick-Item-Insert Feature
  - e. Incrementally Searching Using the All Menu Search Feature
  - 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. Managing General Event Information
  - a. Searching for Events Using the Go To and Search For Tools
  - b. Searching for Events Using the Event Finder Tool
  - c. Reviewing Event Manager Fields
  - d. Customizing Quickpick Lists
  - e. Adding/Changing Event Contact People
  - f. Selecting a Contact from a Different Account
  - g. Editing an Existing Sub-Event (Meal)
  - h. Adding a New Sub-Event
  - i. Selecting Event Staff
  - j. Entering Special Requests or Comments by Hand and from the Scratch Pad
  - k. Formatting Text
  - l. Entering General Event Notes by Hand and from the Scratch Pad
  - m. Relating Files to an Event
  - n. Attaching a Caterease Print to an Event
  - o. Using the Mapping Interface
  - p. Managing Multiple Events Simultaneously
  - q. Importing Customers into Account Manager
  
- VIII. General Event-Management Exercises
  - AFTERNOON BREAK (2:30 P.M.-2:45 P.M.)**
  
- IX. Copying Events for Repeat Business
  - a. Copying Events
  - b. Copying Events for Regular Intervals (Weekly, Monthly, etc.)
  - c. Copying Events to Specific Week Days in a Date Range
  
- X. Using the Event Checklist
  - a. Creating Event 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. Creating a Detailed Event Timeline
  - 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. Setting Event Tax/Service Charge Rates
  - b. Selecting an Optional 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. Sending a Credit Card Payment Link
  - e. Printing Event Payments and Deposits

- XIV. Exercises and Wrap-Up

## Caterease Regional Training Syllabus – Level 1 Day 2 – Morning

- I. Day One Review
  
- II. Managing Accounts (Customers)
  - a. Exploring Account Manager
  - b. Searching for Existing Accounts Using the Account Finder
  - 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. Creating Next Actions and Next-Action Dates
  - c. Creating a Prospect Proposal
  - d. Filling out the Details Tab
  - e. Printing a Prospect Proposal
  - f. Copying a Proposal
  - g. Creating an Event from a Proposal
  
- IV. Account Manager/Prospect Manager Exercises

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

## Caterease Regional Training Syllabus – Level 1 Day 2 – Afternoon

- V. Creating Reminders and History Notes
  - a. Creating/Viewing Contact History Items in Account Manager and Prospect Manager
  - b. Creating/Viewing 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 E-mail
  
- VI. Contact History and Reminder Exercises
  
- VII. Processing Web Inquiries
  - a. Reviewing Web Inquiry Data
  - b. Processing Web Inquiries as Accounts, Prospects, and Events
  
- VIII. Using the Query Tools to Track Business
  - a. Tracking Current Events
  - b. Customizing Grid Columns
  - c. Sorting and Filtering Grid Data
  - d. Generating Prints for a Group of Events
  - e. Generating Multiple Prints for One or Several Events
  - f. Sending Batch E-mails
  
- 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 Report
  - 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. 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.)**

Updated 9/14/2018 EAL