

Caterease Regional Training Syllabus – Level 2

Day 1 – Morning

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

- II. Using Advanced Scheduler Options
 - a. Establishing Advanced Settings in the Scheduler
 - b. Using the Scheduler's Range Control
 - c. Grouping the Scheduler
 - d. Creating Filters in the Scheduler
 - 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/Loading Custom Grid Views
 - e. Filtering Grid Data
 - f. Customizing Conditions in a Filter
 - g. Grouping Query Conditions
 - h. Saving/Loading Custom Grid Filters
 - i. Saving/Loading Custom Grid Layouts
 - j. Using the Find Panel
 - k. Viewing Grids in a Chart or Graph
 - l. Printing Grids
 - m. Exporting Grid Data
 - n. Using Conditional Formatting in Queries
 - o. Making Changes to Events in Batch
 - p. Generating a Print for Multiple Events
 - q. Generating Multiple Prints for Multiple Events
 - r. Building Custom Queries
 - s. Available Queries
 - t. Using Grids in Managers

Caterease Regional Training Syllabus – Level 2 Day 1 – Morning, Continued

- IV. Customizing Screens and Toolbars
 - a. Customizing the Tools Menu and Tools Bar
 - b. Using Quick-Layout Customizing
 - c. Viewing the Customize Window
 - d. Saving/Sharing Window Settings
 - e. Saving/Sharing Layouts
 - f. Adding or Removing Client and Financial Details
 - g. Customizing the Sub-Event Display
 - h. Creating Multiple Event Wizard Layouts

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

- V. Setting Up Default Menus
 - a. Creating an Inventory for Reusable Items
 - b. Establishing Minimum, Default, and Linked Quantities
 - c. Establishing and Applying a Base Price Markup
 - d. Setting up Food/Service Item Types
 - e. Accessing Item Type Tabs from Event Manager
 - f. Copying an Existing Menu in Menu Manager
 - g. Setting Up Automatic Menu Packages
 - h. Using Alternative Views of the Event's Menu
 - i. Saving and Loading a Custom Food/Service Grid View
 - j. Using the Expanded Grid Mode in Event Manager
 - k. Fields Available in the Food/Service Grid
 - l. Printing Food/Service Item Labels
 - m. Available Food/Service Item Label Fields

- VI. Menu Exercises

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

Caterease Regional Training Syllabus – Level 2

Day 1 – Afternoon

- VII. Building Ingredients Lists
 - a. Adding an Ingredient List Category
 - b. Adding 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
- VIII. Building Required Items Lists
 - a. Adding a Required Item List Category
 - b. Adding Required Items
 - c. Inventorying Required Items
 - d. Assigning Inventory Out and Inventory Return Times
 - e. Assigning a Required Item Cost and Packing Unit
 - f. Assigning Required Items to Menu Items
 - g. Managing Required Items in an Event
- IX. Ingredients/Required Items Exercises
 - AFTERNOON BREAK (2:30 P.M.-2:45 P.M.)**
- X. Managing Scheduled Event Items
 - a. Selecting Scheduled Event Items (Vans, Tables, Etc.)
 - b. Viewing and Managing Scheduled Event Items in the Scheduler
 - c. Setting up Scheduled Event Items
 - d. Renaming Scheduled Event Items for Scheduling

Caterease Regional Training Syllabus – Level 2 Day 1 – Afternoon, Continued

- XI. Using the User Notifications Module
 - a. Setting Up Automatic User Notifications
 - a. Establishing a Custom Filter
 - b. Viewing and Managing Notifications
 - c. Enabling and Disabling Notifications
 - d. Deleting Notifications Automatically
 - e. Using the Notifications Backstage Tab

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

- XIII. Using Account Manager
 - a. Applying Default Allergy Information
 - b. Viewing Allergy Alerts in Print Designer
 - c. Combining Duplicate Accounts
 - d. Grouping Customers with Master Accounts
 - e. Importing Customers into Account Manager
 - f. Using the Remote Data Manager

- XIV. 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

- I. Customizing Prints/Miscellaneous Prints
 - a. Accessing Print Designer
 - b. Adding a New Print
 - c. Creating Sub-Menus
 - d. Selecting a Print Layout
 - e. Editing the Header or Footer of a Print
 - f. Adding an Image/Logo to the Header
 - g. Inserting Merge Fields into the Header
 - h. Customizing and Suppressing General Information
 - i. Using the Food/Service Items Filter
 - j. Available Menu Item Fields
 - k. Grouping Information on Prints
 - l. Editing Top and Bottom Notes Sections
 - m. Showing an Event Timeline on an Event Print
 - n. Changing Print Fonts
 - o. Copying Prints
 - p. Customizing Sub-Prints in Miscellaneous Print Designer
 - q. Reviewing Specific Miscellaneous Sub-Prints

- II. Creating Custom Merge Documents
 - a. Adding a New Merge Document
 - b. Creating Headers and Footers in a Document
 - c. Adding Merge Fields to a Document
 - d. Using Formatted Date Fields
 - e. Available Merge Fields
 - f. Using Tables in Merge Documents
 - g. Coloring Row, Column, or Text Background
 - h. Using Merge Tables to Insert Menu Items, Payments, Etc.
 - i. Using Nested Tables to Arrange Information in a Document
 - j. Using Merge Formulas
 - k. Copying an Existing Merge Document
 - l. Organizing Documents into Groups

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

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

- III. Creating E-mail Templates
 - a. Building and Saving an E-mail Template
 - b. Retrieving a Saved E-mail Template
- IV. Using the Print Selection Tool
 - a. Generating Prints from the Print Selection Tool
 - b. Modifying Event Sub-Prints On-the-Fly
 - c. Choosing Sub-Events to Include on Prints
- V. Reviewing Cost/Profit of an Event
 - a. Reviewing the Event Costing Summary
 - b. Changing Menu Line Item Costs
 - c. Updating Event Costing Based on Ingredient Changes
 - d. Setting Discounts for an Event
 - e. Displaying Discounts on the Event Manager Screen

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



Caterease Regional Training Syllabus – Level 2 Day 2 – Afternoon

- VI. Scheduling Future Deposits for an Event
 - a. Adding an Event Deposits
 - b. Making Payments on a Deposit
 - c. Adding Automatic Scheduled Deposit
 - d. Creating Default Automatic Conditional Deposit Schedules
 - e. Setting the Program to Update Deposits Due Automatically
 - f. Including Deposits Due on Event Prints
 - g. Generating the Deposits Due Report
 - h. Generating the Deposits Due Query

- VII. Managing Staff for Events
 - a. Creating Default Shifts or Positions
 - b. Establishing Shift Rules
 - c. Creating a Default List of Employees
 - d. Assigning a Position to an Employee
 - e. Setting Employee Work Schedules and Vacations
 - f. Printing a Scheduled Shifts Report
 - g. Customizing the Staffing Grid
 - h. Fields Available on Staffing Grids
 - i. Printing an Employee Staffing Schedule
 - j. Managing Multiple Shifts
 - k. Batch E-mailing a Confirmation Request
 - l. Confirming Staff for an Event

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

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

- VIII. Using the CEC Mobile App
 - a. Setting up Users for the Mobile App
 - b. Using the App Tools

- IX. 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)

- X. Wrap-Up

- XI. Q&A