

Caterease Regional Training Syllabus – Level 2

Day 1 – Morning

- I. Reviewing the Basics**
 - a. Reviewing Event Manager
 - b. Exploring 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. Using Grids in Managers

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

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

IV. Using the Mapping Interface

- a. Accessing the Mapping Interface
- b. Saving Map Routes
- c. Generating a Map for a Day or Date Range
- d. Using the Mapping Options

V. Customizing Screens

- a. Adding or Removing Client and Financials Details
- b. Using Quick-Layout Customizing
- c. Viewing the Customize Window
- d. Saving/Sharing Window Settings
- e. Saving/Sharing Layouts
- f. Customizing the Sub-Event Display
- g. Creating Custom Event Wizards

VI. 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. Copying an Existing Menu in Menu Manager
- e. Setting up Automatic Menu Packages
- f. Using Alternative Views of the Event's Menu (Event Manager)
- g. Saving and Loading a Custom Food/Service Grid View (Event Manager)
- h. Using the Expanded Grid Mode (Event Manager)
- i. Fields Available in the Food/Service Grid
- j. Printing and Modifying Food/Service Item Labels (Event Manager)
- k. Available Food/Service Item Label Fields

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. Using the Item Details View (Units Tab)
- d. Building Sub-Recipes
- e. Creating Item-Specific Units
- f. Creating Custom General Units
- g. Assigning Ingredients to Menu Items
- h. 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 a Required Item Cost and Packing Unit
- e. Assigning Required Items to Food/Service Items
- f. Managing Required Items in an Event
- g. Assigning Inventory Out and Return Times for Required Items

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



Caterease Regional Training Syllabus – Level 2

Day 1 – Afternoon, Continued

IX. 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 Event Items for Scheduling

X. 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
- d. Deleting Notifications Automatically
- e. Using the Notifications Backstage Tab

XI. Using the Audit Trail

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

Caterease Regional Training Syllabus – Level 2 Day 2 – Morning

I. Day One Review

II. Managing Master Accounts

- a. Grouping Customers with Master Accounts
- b. Importing Customers into Account Manager
- c. Using the Remote Data Manager

III. Establishing System Security

- a. Enabling System Security
- b. Adding a New User
- c. Establishing User Security Settings
- d. Creating User Groups
- e. Establishing Group Security Settings
- f. Selecting Users for a Group

IV. 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

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

V. Scheduling Future Deposits for an Event

- a. Adding an Event Deposit
- 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

Caterease Regional Training Syllabus – Level 2 Day 2 – Afternoon

VI. **Managing Shifts and Staffing**

- 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

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

VII. **Using the CEC Mobile App**

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

VIII. **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)

IX. **Overview/Discussion of Add-In Modules**

X. **Wrap-Up/Q&A**