

Caterease Onboarding Timeline



All Users

Setup/Administrative Users

All Users

Booking a New Event

- Accessing the Event Wizard
- Adding a New Client
- Adding Contact People
- Entering Event Details
- Building an Event's Menu
- Entering General Event Comments
- Generating and Emailing a Print
- Posting a Payment

Event Management Tools

- Searching for an Event
- Creating an Event Timeline
- Creating an Event Checklist
- Copying Events
- Managing Tax/Service Charge Rates
- Scheduling Future Payments
- Evaluating Cost/Profit
- Applying Discounts
- Attaching Files

Customizing Event Prints

- Accessing Print Designer
- Adding a New Print
- Changing Print Headers
- Saving and Previewing Changes
- Customizing and Suppressing Sections
- Modifying Food/Service Item Details
- Editing Top/Bottom Notes
- Language Translations
- Changing Print Fonts
- Changing Print Layouts
- Modifying Back-of-House Prints

Default Menu Setup

- Confirming Food/Service Item Types and Default Tax Rates
- Renaming and Rearranging Menus in Menu Manager
- Adding New Menus and Menu Items
- Modifying Menu Item Details
- Establishing Minimum, Linked, and Inventory Quantities
- Modifying Food/Service Items in Batch
- Creating Modifiers
- Building Automatic Menu Packages
- Copying an Existing Menu
- Setting up Required Items
- Setting up Ingredients
- Managing Vendors

General Program Setup

- Customizing Quickpick Lists
- Renaming Fields
- Establishing New Booking Defaults
- Creating Required Fields
- Creating and Displaying Custom Fields
- Setting up the Scratch Pad
- Limiting Daily Number of Events
- Establishing Security
- Setting up Default Timelines
- Setting up Default Checklists

General Q&A

- Up to 5 questions per company submitted in advance
- Additional private training may be recommended

Availability (Times Eastern)

Mon: 10:00 – 11:00 AM
Wed: 11:00 AM – 12:00 PM
Fri: 1:00 – 2:00 PM

Availability (Times Eastern)

Mon: 3:00 – 4:00 PM
Wed: 9:00 – 10:00 AM

Availability (Times Eastern)

Tues: 10:00 – 11:00 AM
Wed: 1:00 – 2:00 PM

Availability (Times Eastern)

Tues: 3:00 – 4:00 PM
Thurs: 1:00 – 2:00 PM

Availability (Times Eastern)

Tues: 1:00 – 2:00 PM
Thurs: 10:00 – 11:00 AM

Availability (Times Eastern)

Fri: 3:00 – 4:30 PM