Caterease Regional Training Syllabus – Level 1
Day 1

I. Introducing Caterease: General Concepts
- a. Introducing Caterease User Information Notifications
- b. Sending User-to-User Instant Messages
- c. Exploring the Ribbon Tabs and Navigation Pane
- d. Introducing Event Manager (Including Sub-Event)
- e. Using Data-Entry Tools (Quickpicks, Calendar, Calculator)
- 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. Searching for an Existing Client by Name
- b. Using the Account Finder Tool
- c. Adding a New Account for the New Event
- d. Filling out General Event Details
- e. Entering Times by Hand and by Using the Time Wizard Tool
- f. Entering Room Details and Off-Premise Venue Information
- g. Selecting Food/Service Items
- **h.** E-mailing an Event Print

III. Using the Calendar of Events (Scheduler)
- a. Using the Scheduler: Viewing Events in the Scheduler
- b. Generating Event Prints Directly from the Scheduler
- c. Generating Multiple Prints Simultaneously
- d. Grouping the Scheduler
- e. Viewing Events in a Venue Graph
- f. Adding a New Event from the Scheduler

Afternoon Break (2:30 P.M. – 2:45 P.M.)

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Caterease Regional Training Syllabus – Level 1
Day 1 (cont.)

IV. 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 Food/Service Items from Event to Event

V. Customizing Screens and Toolbars

a. Customizing the Tools Menu
b. Customizing the Tools Bar
c. Using Quick-Layout Customizing
d. Adding or Removing Client and Financials Details

VI. 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 Shifts or Staff
j. Fields Available in the Staffing Grid
k. Entering Special Requests or Comments by Hand and from the Scratch Pad
l. Formatting Text
m. Entering General Event Notes by Hand and from the Scratch Pad
n. Relating Files to an Event
o. Attaching a Caterease Print to an Event
p. Managing Multiple Events Simultaneously

VII. Copying Events for Repeat Business

a. Copying Events to Specific Dates
b. Copying Events for Regular Intervals (Weekly, Monthly, etc.)
c. Copying Events to Specific Weekdays in a Date Range

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Caterease Regional Training Syllabus – Level 1
Day 2

I. Day One Review

II. Using the Event Checklist

a. Retrieving Items from Default 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

III. Using the Event Timeline

a. Retrieving Items from Default Timelines
b. Adding Unique Timeline Items by Hand
c. Adding Times to a Food/Service Item
d. Printing a Timeline for an Event
e. Showing Event Timelines on Other Prints

IV. Managing Event Tax and Revenue Sources

a. Editing Event Tax/Service Charge Rates
b. Selecting an Optional Tax Schedule for an Event
c. Setting up Food/Service Item Types
d. Accessing Food/Service Item Type Tabs from Event Manager

V. 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

Afternoon Break (2:30 P.M. – 2:45 P.M.)

Caterease Regional Training Syllabus – Level 1

Day 2 (continued)

VI. 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 and Applying Allergy Details
f. Adding or Editing Contact People
g. Adding an Account Who is Not a Company
h. Combining Duplicate Accounts
i. Adding and Retrieving Events from Account Manager
j. Importing Customers into Account Manager

VII. Customizing Prints in Print Designer

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. Grouping Information on Prints
k. Editing Top and Bottom Notes Sections
l. Showing an Event Timeline on an Event Print
m. Changing Print Fonts
n. Copying Prints

VIII. Editing Sub-Prints in Miscellaneous Print Designer

a. Customizing and Suppressing General Information
b. Editing the Header and Top Notes Sections
c. Changing Print Fonts
d. Customizing the Menu Section
e. Selecting and Grouping Details
f. Setting Special Print Options

Caterease Regional Training Syllabus – Level 1

Day 2 (continued)

IX. Using the Print Selection Tool

a. Generating Prints from the Print Selection Tool
b. Modifying Event Sub-Prints On-the-Fly
c. Generating a Print for Selected Sub-Events

X. Creating E-mail Templates

a. Building an E-mail Template
b. Retrieving a Saved E-mail Template

XI. Using the Current Events Query to Track Business

a. Tracking Current Events
b. Working with Grids: Customizing Grid Columns
c. Filtering Grid Data
d. Printing Grids
e. Generating Event Prints for a Group of Events
f. Generating Multiple Event Prints for One or Several Events
g. Sending Batch E-mails

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Caterease Regional Training Syllabus – Level 1
Day 3

I. Day Two Review

II. 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

III. Using the Caterease Backstage Tab

a. Reviewing Data in the Dashboard
b. Reviewing Recently Edited Records
c. Contacting Caterease Support

Overview of Add-In Modules**

IV. Banquets Module

a. Adding a Master List of Setup Styles
b. Multiple Locations to Group Rooms
c. Add Additional info for Locations – Address, Phone, Category, etc.
d. Add Banquet Rooms to Locations
e. Establish Setup Styles, Capacities and Breakout Rooms for Each Room
f. Set Default Room Charge, Category and Color

We cover only the Add-in modules of those in attendance that are part of their Caterease program.

Caterease Regional Training Syllabus – Level 1
Day 3 (continued)

V. Touch Manager

a. Creating/Viewing Contact History Items in Account and Prospect Manager
b. Creating/Viewing Reminders in Account 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
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

VI. Prospect Manager

a. Comparing Prospect Manager to Account Manager
b. Adding a New Prospect in Prospect Manager
c. Creating Next Actions and Next-Action Dates
d. Establishing a Filter in Prospect Manager
e. Creating a Prospect Proposal
f. Filling out the Details Tab
g. Printing a Prospect Proposal
h. Copying a Proposal
i. Creating an Event from a Proposal

VII. Document Builder/Merge Docs

a. Adding a New Merge Document
b. Adding Merge Fields to a Document
c. Available Merge Fields
d. Using Formatted Date Fields
e. Creating Headers and Footers in a Document
f. Using Tables in Merge Documents
g. Using Merge Tables to Insert Menu Items, Payments, Etc.
h. Using Nested Tables to Arrange Information in a Document
i. Using Merge Formulas
j. Organizing Documents into Groups

VIII. WRAP-UP/Q&A

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