



CaterEase Regional Training Syllabus – Level 2 Day 1

- 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. Printing Grids
 - j. Saving/Loading Custom Grid Layouts
 - k. Using the Find Panel
 - l. Viewing Grids in a Chart or Graph
 - 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
 - t. List of Available Queries

Break (2:45 – 3:00 P.M.)





Caterease Regional Training Syllabus – Level 2 Day 1 - Continued

IV. Using the Mapping Interface

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

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 (Menu Manager)
- b. Establishing Minimum, Default, and Linked Quantities (Menu Manager)
- c. Copying an Existing Menu in Menu Manager
- d. Setting up Automatic Menu Packages (Menu Manager)
- e. Associating Menu Items (Menu Manager) **
- f. Managing Menu Item Modifiers (Menu Manager) **
- g. Using Alternative Views of the Event's Menu (Event Manager)
- h. Saving and Loading a Custom Food/Service Grid View (Event Manager)
- i. Using the Expanded Grid Mode (Event Manager)
- j. Fields Available in the Food/Service Grid
- k. Establishing and Applying a Base Price Markup (Event Manager)
- l. Printing and Modifying Food/Service Item Labels (Event Manager)
- m. Available Food/Service Item Label Fields





Caterease Regional Training Syllabus – Level 2 Day 2

I. 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

II. 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

Break (3:00 – 3:15 P.M.)





Caterease Regional Training Syllabus – Level 2 Day 2 - Continued

III. 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

IV. 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

V. Using the Audit Trail

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

VI. Managing Master Accounts

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





Caterease Regional Training Syllabus – Level 2 Day 3

- I. 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

- II. 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

- III. 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. Including Deposits Due on Event Prints
 - f. Generating the Deposits Due Report
 - g. Generating the Deposits Due Query
 - h. Setting the Program to Update Deposits Due Automatically

Break (2:45 – 3:00 P.M.)





Caterease Regional Training Syllabus – Level 2 Day 3 - Continued

IV. 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. Customizing the Staffing Grid
- g. Fields Available in Staffing Grids
- h. Printing an Employee Staffing Schedule
- i. Managing Multiple Shifts
- j. Batch E-mailing a Confirmation Request
- k. Confirming Staff for an Event
- l. Printing a Scheduled Shifts Report

V. Using the CEC Mobile App

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

VI. 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)

VII. X. Overview/Discussion of Add-In Modules (If needed)

WRAP-UP/Q&A

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