CATEREASE

# 2 - Day Caterease Level 2 Training Syllabus
## 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. 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

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

CATEREASE

# 2 - Day Caterease Level 2 Training Syllabus
## Day 1 – Morning, 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

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

# 2-Day Caterease Level 2 Training Syllabus
## 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.)

2-Day Caterease Level 2 Training Syllabus
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

# 2 - Day Caterease Level 2 Training Syllabus
## 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.)

# 2 - Day Caterease Level 2 Training Syllabus
## Day 2 – Afternoon

**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. 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

**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. 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

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

# 2-Day Caterease Level 2 Training Syllabus
## Day 2 – Afternoon, Continued

**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 (If needed)**

**X. WRAP-UP/Q&A**

Updated 12/15/2021