



3-Day CaterEase Level 1 Training Syllabus 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.)





3-Day CaterEase Level 1 Training Syllabus

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





3-Day Caterease Level 1 Training Syllabus 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.)





3-Day CaterEase Level 1 Training Syllabus

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





3-Day Caterease Level 1 Training Syllabus

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





3-Day Caterease Level 1 Training Syllabus 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.**





3-Day Caterease Level 1 Training Syllabus

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

