



3-Day CaterEase Level 1 Training Syllabus Day 1

- I. Introducing CaterEase: General Concepts**
 - a. Exploring the Ribbon Tabs and Navigation Pane
 - b. Introducing Event Manager (Including Sub-Event)
 - c. Using Data-Entry Tools (Quickpicks, Calendar, Calculator)
 - d. Adding and Deleting Records
 - e. Selecting Records from Pre-Set Lists
 - f. Saving or Cancelling Changes
 - g. Accessing Context-Sensitive Help

- II. Booking a New Event Using the Event Wizard**
 - a. Event Wizard, Step 1: Selecting a Client
 - b. Event Wizard, Step 2: Entering Event Details
 - c. Event Wizard, Step 3: Entering Menu Details
 - d. 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. Using a Venue Graph
 - f. Adding an 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
- a. Copying Food/Service Items from Event to 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-Menus Search Feature

V. Managing General Event Information

- a. Searching for Events
- b. Searching for Events Using the Event Finder
- c. Reviewing Event Manager Fields
- d. Customizing Quickpick Lists
- e. Adding or Editing Contact People
- f. Adding a Sub-Event (or Meal)
- g. Editing an Existing Sub-Event
- h. Selecting Event Shifts or Staff
- i. Fields Available in the Staffing Grid
- j. Entering Special Requests or Comments by Hand and from the Scratch Pad
- k. Formatting Text
- l. Entering General Event Notes by Hand and from the Scratch Pad
- m. Relating Files to an Event
- n. Attaching a CaterEase Print to an Event
- o. Managing Multiple Events Simultaneously

VI. 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 Days of the Week





3-Day CaterEase Level 1 Training Syllabus Day 2

VII. Sharing Details Through the Customer Portal

- a. Setting Up the Portal
- b. Sending a Link to the Portal
- c. Sharing Files Through the Portal
- d. Initiating Chat & Responding to a Customer's Chat Message
- e. Managing Portal Chats for Multiple Events

VIII. 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

IX. 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

X. Managing Event Tax and Revenue Sources

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

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





3-Day Caterease Level 1 Training Syllabus

Day 2 (continued)

XI. Managing Event Payments and Deposits

- a. Adding and Editing a Payment for an Event
- b. Scheduling Future Event Deposits
- c. Making Payments on a Deposit
- d. Processing a Payment with HPay
- e. Creating and Editing Payment Links from a Manager
- f. Processing a Payment Link Payment
- g. Refunding a Payment with HPay

XII. Managing Accounts (Customers)

- a. Exploring Account Manager
- b. Searching for Accounts Using the Account Finder
- c. Adding an Account in Account Manager
- d. Fields Available in Account Manager
- e. Adding or Editing Contact People
- f. Adding an Account Who is Not a Company
- g. Combining Duplicate Accounts
- h. Adding and Retrieving Events from Account Manager
- i. Importing Customers into Account Manager

XIII. Managing Contact People

- a. Adding a New Contact in Contact Manager
- b. Finding a Contact in Contact Manager
- c. Combining Duplicate Contacts
- d. Deleting a Contact





3-Day CaterEase Level 1 Training Syllabus

Day 2 (continued)

XIV. Customizing Prints in Print Designer

- a. Accessing Print Designer
- b. Creating Sub-Menus in Print Designer
- c. Adding a New Print
- 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 an Existing Prints
- o. Editing General Details on Miscellaneous Prints
- p. Customizing the Menu Section (Production Sheet, Fancy Menu)
- q. Selecting Required Item Details (Required Item List Print)
- r. Grouping Required Item Details (Ingredients List)
- s. Setting Special Print Options (Production Sheet, Service Order)

XV. Using the Print Selection Tool

- a. Generating Prints from the Print Selection Tool
- b. Modifying Event Sub-Prints On-the-Fly
- c. Choosing Sub-Events to Include on Prints





3-Day Caterease Level 1 Training Syllabus Day 3

XVI. Creating E-mail Templates

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

XVII. Tracking Business with the Current Events Query

- a. Tracking Current Events
- b. Working with Grids
- c. Printing Grids
- d. Generating Event Prints
- e. Generating Multiple Prints for Multiple Events
- f. Generating Batch E-mails
- g. Making Changes to Events in Batch
- h. Using Caterease Queries

XVIII. Running Quick-Access Reports

- a. Generating the Event Sheet
- b. Generating the Event Master Report
- c. Generating the Revenue Forecast Report
- d. Generating the Deposits Due Report
- e. Generating the Event Items Report
- f. Generating the Weekly Kitchen Plan Report

XIX. Using the Caterease Backstage Tab

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





3-Day CaterEase Level 1 Training Syllabus

Day 3 (continued)

Overview of Add-In Modules**

XX. 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

XXI. 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

XXII. 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

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





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Day 3 (continued)

Overview of Add-In Modules**

XXIII. 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
- a. Organizing Documents into Groups

WRAP-UP/Q&A