



Caterease Level 1 Training Syllabus

- 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

- IV. **Advanced Menu Management**
 - a. Adding a Custom Food/Service Item to an Event
 - b. Copying Food/Service Items from Event to Event
 - c. Modifying an Item's Default Description, Instructions, or Other Details
 - d. Including Food/Service Item Modifications on Prints
 - e. Using the Quick-Item-Insert Feature
 - f. Incrementally Searching Using the All-Menu Search Feature



Caterease Level 1 Training Syllabus

- V. **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. Editing an Existing Sub-Event (Meal)
 - g. Adding a New Sub-Event
 - h. Selecting Event Shifts or Staff
 - i. Fields Available in the Staffing Grid
 - j. Entering Special Requests or Comments
 - k. Formatting Text
 - l. Entering General Event Notes
 - 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

- 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



Caterease Level 1 Training Syllabus

- VIII. Using the Event Checklist**
 - a. Creating an Event Checklist of To Do Items
 - 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. Creating a Detailed Event Timeline
 - 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. Setting Event Tax Rates
 - b. Selecting an Optional Tax Schedule
 - c. Setting up Food/Service Item Types
 - d. Accessing Food/Service Item Type Tabs from Event Manager

- XI. 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. 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



Caterease Level 1 Training Syllabus

- 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. Using the Navigation Bar
 - d. Combining Duplicate Contacts
 - e. Deleting a Contact

- XIV. Managing Default Menus**
 - a. Adding a New Menu
 - b. Adding Menu Items to Default Menu
 - c. Creating a Description, Label, Notes, or Image for an Item
 - d. Editing Additional Menu Items Details
 - e. Fields Available in the Food/Service Items Grid
 - f. Copying items from menu to Menu
 - g. Printing a Menu or Menu Summary
 - h. Tracking used Menu items via the Menu Item Usage Report



Caterease Level 1 Training Syllabus

XV. Day One Review

XVI. 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)

XVII. 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

XVIII. Creating E-mail Templates

- a. Creating E-mail Template
- b. Retrieving a Saved E-mail Template



Caterease Level 1 Training Syllabus

- XIX. 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

- XX. 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

- XXI. 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**

- XXII. 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





Caterease Level 1 Training Syllabus

XXIII. 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

XXIV. 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



Caterease Level 1 Training Syllabus

- XXV. 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

*****For private classes, we cover only the Add-in modules that are part of your Caterease program.***

- XXVI. Program Review & Customization

For private classes, the trainer will log into your live Caterease program at the end of class to assist with setup in the following areas:

- a. Customizing Quickpick Lists
- b. Creating and Displaying User Defined Fields
- c. Changing the Names of Fields
- d. Establishing Required Fields
- e. Setting New Booking Defaults
- f. Creating a Custom Event Wizard
- g. Setting Up HPay (Sign up should already be completed prior to trainer's arrival)
- h. Setting Up Graze Online Ordering
- i. Creating Custom Event Prints (Print Designer)
- j. Creating Custom Merge Letters and Other Documents (Document Builder)