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
    e. Using the Quick-Item-Insert Feature
    f. Incrementally Searching Using the All-Menu Search Feature

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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

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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. 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

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

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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 Menus
   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

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XV.   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

XVI.   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

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

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

XIX. 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

XX. 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**

XXI. 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

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XXII. 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

XXIII. 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

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XXIV. 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.

XXV. 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)