

## Caterease Level 2 Training Syllabus

- 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. Saving/Loading Custom Grid Views
  - c. Filtering Grid Data
  - d. Customizing Conditions in a Filter
  - e. Grouping Query Conditions
  - f. Saving/Loading Custom Grid Filters
  - g. Printing Grids
  - h. Saving/Loading Custom Grid Layouts
  - i. Using the Find Panel
  - j. Viewing Grids in a Chart or Graph
  - k. Exporting Grid Data
  - l. Using Conditional Formatting in Queries
  - m. Making Changes to Events in Batch
  - n. Generating a Print for Multiple Events
  - o. Generating Multiple Prints for Multiple Events
  - p. Building Custom Queries
  - q. Using Grids in Managers
  - r. List of Available Queries

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### 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. Using Alternative Views of the Event's Menu (Event Manager)
- f. Saving and Loading a Custom Food/Service Grid View (Event Manager)
- g. Using the Expanded Grid Mode (Event Manager)
- h. Fields Available in the Food/Service Grid
- i. Establishing and Applying a Base Price Markup
- j. Printing and Modifying Food/Service Item Labels
- k. Available Food/Service Item Label Fields

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### **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 General Custom Units
- g. Assigning Ingredients to Menu Items
- h. Modifying Menu Item 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

## Caterease Level 2 Training Syllabus

### IX. Managing Scheduled Event Items

- a. Setting up Scheduled Event Items
- b. Selecting Scheduled Event Items (Vans, Tables, Etc.)
- c. Viewing and Managing Scheduled Event Items in the Scheduler.3

### X. Creating Automatic Change Notifications

- a. Setting up Automatic User Notifications
- b. Establishing a Custom Filter
- c. Viewing and Managing Notifications
- d. Enabling and Disabling Notifications
- e. Deleting Notifications Automatically
- f. 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

### XII. Managing Master Accounts

- a. Grouping Customers with Master Accounts
- b. Importing Customers into Account Manager

## Caterease Level 2 Training Syllabus

- I. 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
- II. 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
- III. Scheduling Future Deposits for an Event**
  - a. Creating Default Automatic Conditional Deposit Schedules
  - b. Showing Deposits Due on Event Prints
  - c. Adding an Event Deposit Manually
  - d. Making Payments on a Deposit
  - e. Adding a Conditional Event Deposit Schedule
  - f. Generating the Deposits Due Report
  - g. Generating the Deposits Due Query
  - h. Setting the Program to Update Deposits Due Automatically

## Caterease Level 2 Training Syllabus

### IV. 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 (Event Manager)
- 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

### V. Using the CEC Mobile App

- a. Setting up Users for the Mobile App
- b. Logging in to the Mobile App
- c. Using the App Tools
- d. Managing Your Web Inquiries

### VI. 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)

## Caterease Level 2 Training Syllabus

### Overview of Add-In Modules\*\*

#### VII. 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

#### VIII. 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

#### IX. 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 2 Training Syllabus

### X. 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

### I. Program Review & Customization

For private classes, the trainer will log into your live Caterease program at the end of class to assist with setup that might be needed.

Assistance with customization may include, but not be limited to, screen or print customization, Mosaic and Graze Online Ordering. In addition, trainer can review how the program is set up, the information entered and how the program is used to determine if it meets the needs of overall operations and the organization.

### II. WRAP-UP/Q&A

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