

Caterease Onboarding Timeline



GETTING STARTED – ALL USERS

BOOKING A NEW EVENT	EVENT MANAGEMENT TOOLS	PROCESSING PAYMENTS WITH MOSAIC
<ul style="list-style-type: none"> • Accessing the Event Wizard • Adding a New Client • Adding Contact People • Entering Event Details • Building an Event's Menu • Entering General Event Comments • Generating and Emailing a Print • Posting a Payment 	<ul style="list-style-type: none"> • Searching for an Event • Creating an Event Timeline • Creating an Event Checklist • Copying Events • Managing Tax/Service Charge Rates • Scheduling Future Payments • Evaluating Cost/Profit • Applying Discounts • Attaching Files • Sharing the Event Through the Portal 	<ul style="list-style-type: none"> • Storing a card on file • Processing a card payment manually • Processing a payment on a new card • Customizing the payment link invoice • Sending a payment link • Creating a payment link email template • Refunding payments • Managing payment links • Tracking payments

SETTING UP – ADMINISTRATIVE USERS

ANY USERS

SETTING UP ONLINE ORDERING	CUSTOMIZING EVENT PRINTS	SETTING UP DEFAULT MENUS	GENERAL PROGRAM SETUP	GENERAL Q&A
<ul style="list-style-type: none"> • Preparing Caterease menus • Exporting menus for online ordering • Organizing your online menus • Assigning menus to the online storefront • Establishing online ordering settings • Creating delivery zones 	<ul style="list-style-type: none"> • Accessing Print Designer • Adding a New Print • Changing Print Headers • Saving and Previewing Changes • Customizing and Suppressing Sections • Modifying Food/Service Item Details • Editing Top/Bottom Notes • Language Translations • Changing Print Fonts • Changing Print Layouts • Modifying Back-of- House Prints • Sampling Reports 	<ul style="list-style-type: none"> • Confirming Food/Service Item Types and Default Tax Rates • Rearranging Menus in Menu Manager • Adding New Menus and Menu Items • Modifying Menu Item Details • Establishing Minimum, Linked, and Inventory Quantities • Changing Food/Service Items in Batch • Creating Modifiers • Building Automatic Menu Packages 	<ul style="list-style-type: none"> • Customizing Quickpick Lists • Renaming Fields • Establishing New Booking Defaults • Creating Required Fields • Creating and Displaying Custom Fields • Setting up the Scratch Pad • Limiting Daily Number of Events • Establishing Security • Setting Up Default Timelines & Checklists 	<ul style="list-style-type: none"> • Up to 5 questions per company submitted in advance • Additional private training may be recommended