

web training syllabus

Booking A New Event

Topics covered:

- I. Adding a new event in Event Manager
- II. Adding a new customer for the event
 - A. Entering general customer information
 - B. Filling in miscellaneous account fields
- III. Adding contact people to an account
 - A. Filling in contact name and address information
 - B. Copying contact information back to account
- IV. Filling in event information
- V. Adding contact people from within an event
 - A. Selecting contacts on-the fly
 - B. Adding new contact to the account
- VI. Filling in miscellaneous event information
- VII. Customizing quickpick lists
- VIII. Adding a sub-event
- IX. Using the time wizard
- X. Establishing setup style and room in an event
- XI. Copying setup notes from Scratch Pad[†]
- XII. Selecting or adding a site location in an event
- XIII. Adding delivery information
- XIV. Customizing the sub-event window
 - A. Renaming tabs
 - B. Removing tabs
- XV. Selecting menu items from menus
 - A. Retrieving items in various ways (dragging & dropping, double-clicking, etc.)
 - B. Using Insert Mode in menu selection[†]
- XVI. Selecting menu packages[†]
- XVII. Adding custom menu items
- XVIII. Customizing the Food/Service grid
- XIX. Adding & modifying menu item descriptions
- XX. Adding staffing to an event[†]
- XXI. Copying comments from Scratch Pad[†]
- XXII. Printing a contract
- XXIII. Emailing a contract
 - A. Using the Caterease email address book
 - B. Imbedding a Marketing Tools merge letter as the body of an email
- XXIV. Posting a payment
- XXV. Booking an event using the Event Wizard
- XXVI. Q & A

[†] Not available in the Express version of the program.

Total Class Time: 1 Hour, 30 Minutes

Important Notes:

- High-speed web access is required.
- Payment in full must be made prior to the class.
- Caterease is not responsible for loss of connection, either by the student or by the moderator. If a student cannot attend a class due to technical problems, he or she will be allowed to attend at a later date. If a moderator is forced to cancel a class due to technical problems, that class will be rescheduled. No monies will be refunded.

