

web training syllabus

Queries and Detail Grids

Topics covered:

- I. Running a Current Events query
 - A. Generating reports
 - B. Printing a contract or multiple prints[†] for multiple events
 - C. Sending batch emails for multiple events*
- II. Customizing the results grid
 - A. Adding/Removing/Rearranging columns in the grid
 - B. Sorting data
 - C. Grouping data[†]
 - D. Filtering grid data[†]
 - E. Saving custom filters for future use[†]
 - F. Saving custom views for future use[†]
 - G. Printing the grid data[†]
 - H. Exporting the grid data
 - I. Viewing results in a chart or graph*
- III. Running an Accounts Receivable query
- IV. Creating a custom Event Query
 - A. Adding multiple query conditions
 - B. Using relative date ranges to query
 - C. Querying by one condition OR another
 - D. Saving custom queries for future use
- V. Querying your customer list
- VI. Querying your list of prospective customers[‡]
- VII. Tracking all menu item activity*
 - A. Using relative date ranges
 - B. Printing a detail report
 - C. Printing menu item labels
- VIII. Modifying menu items labels*
- IX. Tracking payment activity*
- X. Tracking staffing activity*
- XI. Tracking sub-event activity*
- XII. Q & A

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

* Only available in the Professional version of the program.

[‡] Only available if you own the Prospect Manager add-in to the program.

Total Class Length: 1 Hour

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.

