Caterease Training Syllabus

Day One

Morning Session

The morning session on Day One explores several different approaches to adding a new event. When this session is done, students will be able to:

- *Check availability using the Scheduler*
- *Book a new event from Event Manager*
- *Retrieve menu items for an event from pre-existing menus*
- *Add custom menu items by hand*
- *Copy menu items from one event to another*
- *Add shifts and staff to an event*
- *Include special requests or comments for an event, optionally copying them from Scratch Pad*
- *Print and email a contract*
- *Book a new event using the Event Wizard tool*
- *Book a new event from the Scheduler*
- *Book a new event from Account Manager*

I. Class Introductions

II. Checking Availability (the Scheduler)
   A. Opening the Scheduler
   B. Changing the Scheduler Views (Day, Week, Workweek, Week)
   C. Grouping the Calendar
   D. Adding Notes to the Scheduler
   E. Retrieving Events from Scheduler

III. Event Manager Introduction
   A. Reviewing the "Event" Display
      1. Using the "Type and Hit **[Enter]**" Approach
      2. Using Data-Entry Tools (Quickpicks, Drop-Down Calendars, etc.)
      3. Reviewing the Miscellaneous Tab
   B. Reviewing the "Sub-Event" Display
      1. Introducing the "Sub-Event" Concept: Menu, Venue, Time
      2. Introducing the Food/Service Tab

IV. Booking a New Event from Event Manager
   A. Selecting an Existing Account/Contact Person
   B. Entering New Event Information – *General* and *Miscellaneous* Tabs
   C. Adding New Contact People to an Event
   D. Adding a Sub-Event
      1. Filling Out General Sub-Event Information
      2. Selecting a Banquet Room
      3. Entering Off-Premise Information
      4. Copying Notes from Scratch Pad
   E. Entering Menu Items
      1. Retrieving Items from Menus
      2. Adding Custom Menu Items by Hand
   F. Generating a Contract
      1. Printing a Contract
      2. Emailing a Contract

V. Event Quickpick List Exercise

Caterease Training Syllabus

Day One

VI. Morning Break

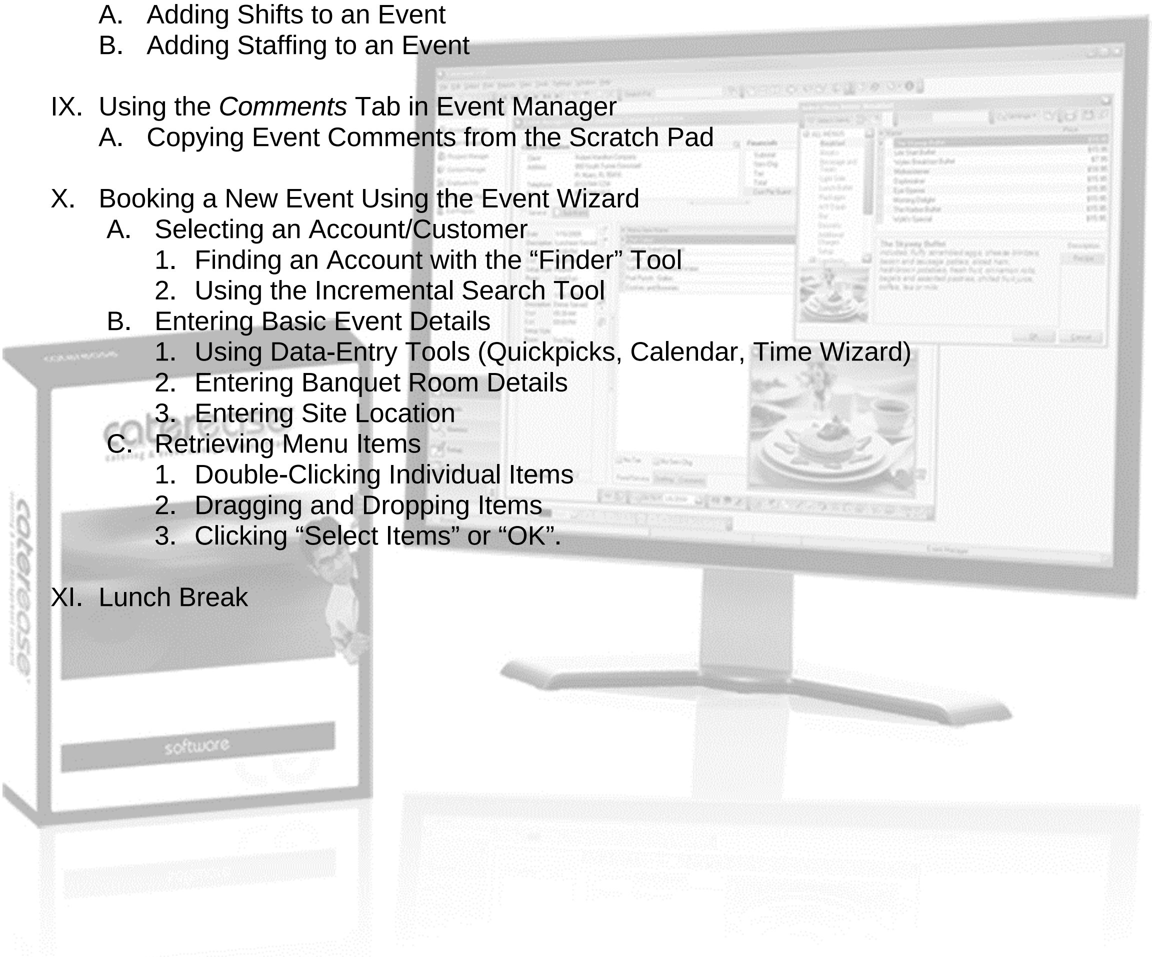
VII. Advanced Menu Features
- A. Retrieving Menu packages
- B. Adding Unique Menu Items to an Event by Hand
- C. Adding & Modifying Menu Item Descriptions/Recipes
- D. Customizing the Event Manager *Food/Service* Tab
- E. Inserting Menu Items
- F. Copying Menus from Event to Event

VIII. Adding Staffing to an Event
- A. Adding Shifts to an Event
- B. Adding Staffing to an Event

IX. Using the *Comments* Tab in Event Manager
- A. Copying Event Comments from the Scratch Pad

X. Booking a New Event Using the Event Wizard
- A. Selecting an Account/Customer
  1. Finding an Account with the “Finder” Tool
  2. Using the Incremental Search Tool
- B. Entering Basic Event Details
  1. Using Data-Entry Tools (Quickpicks, Calendar, Time Wizard)
  2. Entering Banquet Room Details
  3. Entering Site Location
- C. Retrieving Menu Items
  1. Double-Clicking Individual Items
  2. Dragging and Dropping Items
  3. Clicking “Select Items” or “OK”.

XI. Lunch Break



Caterease Training Syllabus

Day One

Afternoon Session
The afternoon session on Day One begins by focusing on creating and managing accounts (customers), and then moves on to customizing screen displays. The day ends with a discussion of some advanced event management tools. When this session is done, students will be able to:

- *Add a new client in Account Manager*
- *Add a new client using the Event Wizard tool*
- *Add a new client in Event Manager*
- *Create a new client who is not a company*
- *Generate account prints and reports*
- *Use several advanced account tools*
- *Redesign various screen displays throughout the program*
- *Use several advanced event tools*

I. Booking a New Event from the Scheduler
  A. Reviewing a Specific Date in the Scheduler
  B. Accessing the Event Wizard from the Calendar
    1. Selecting an Account for the New Event
    2. Entering Basic Event Details
    3. Continuing on to Select Menu Items
  C. Using the Sub-Event Calendar
  D. Accessing the Event Wizard from the Sub-Event Calendar
    1. Selecting an Account
    2. Entering Basic Event Details
  E. Changing Grouping in the Sub-Event Calendar

II. Booking a New Event from Account Manager
  A. Introducing the Account Manager Display
  B. Finding a Specific Account
  C. Adding a New Event from the Events Tab

III. Required Fields Exercise

IV. Adding a New Account (Account Manager)
  A. Revisiting the “Type and Hit [Enter]” Approach
  B. Using the General Tab
  C. Using the Misc. Tab
  D. Using the User Defined Tab
  E. Adding New Contact People to an Account

V. Adding a New Account (Event Wizard)
  A. Entering General Details
  B. Entering Miscellaneous Details
  C. Adding a New Contact Person

VI. Adding a New Account (Event Manager)

VII. Account Quickpick Lists Exercise

VIII. Adding a New Customer Who is Not a Company

Caterease Training Syllabus

Day One

IX. Advanced Account Management
  - A. Deleting an Account
  - B. Viewing/Editing Contact Details
  - C. Viewing/Editing Events from Account Manager
  - D. Generating a Consolidated Billing Statement
  - E. Generating Account Reports
  - F. Account Manager Tools
    1. Posting Payments to an account
    2. Combining Duplicate Accounts
    3. Creating a Default Site Locations

X. Afternoon Break

XI. Customizing Screen Displays
  - A. Redesigning Account Manager
    1. Removing Fields from the Screen
    2. Rearranging Fields on the Screen
    3. Moving Fields from Tab to Tab
    4. Removing/Renaming/Rearranging Tabs
  - B. Redesigning Event Manager
    1. Removing/Rearranging Fields
    2. Removing/Renaming Tabs
    3. Customizing Account/Financial Details
    4. Using the Split Screen Display

XII. Using Event Manager Tools
  - A. Finding an Existing Event
    1. Using the Event Finder Tool
    2. Using the “Go To” Tool
  - B. Duplicating an Existing Event
    1. Copying an Event
    2. Switching Account Information on an Event
  - C. Checking Event Conflicts On-The-Fly
  - D. Editing Optional Billing Information
  - E. Viewing/Modifying Event Tax/Service Charge Rates
  - F. Tracking Event Specific Dates
  - G. Adding Event Payments
  - H. Scheduling Future Deposits
  - I. Using a Regular Deposit Schedule
  - J. Generating Prints/Subprints
  - K. Applying Event Discount Rates
  - L. Getting Driving Directions
  - M. Managing Multiple Events Simultaneously
  - N. Viewing Related Events
  - O. Checking Event Status History

Caterease Training Syllabus

Day Two

Morning Session

After Day One's focus on getting information into the program, the morning session on Day Two explores several powerful tools and reports to get that information back out again. When this session is done, students will be able to:

- *Track all current events and accounts receivable*
- *Build custom results grids for reporting*
- *Print and/or export grid data*
- *Print a batch of multiple prints with one mouse click*
- *Email a batch of clients simultaneously*
- *Review information in Chart View format*
- *Build a custom event query*
- *Run a variety of quick-access reports*
- *Take advantage of Caterease add-ins, including Contact Manager and Marketing Tools*

I. Finding Current Events and Accounts Receivable
   A. Running a Current Events Query
   B. Customizing the Results Grid
   C. Sorting and Grouping Data
   D. Saving the Grid View
   E. Creating and Saving Grid Filters
   F. Printing/Exporting Grid Data
   G. Generating Prints, Reports and Batch Prints
   H. Batch Emailing
   I. EZ Chart View
   J. Using the Accounts Receivable Query

II. Client Contacts Query
   A. Running a Client Contacts
   B. Playing in the Grid Creating a Custom Event Query

III. Creating a Custom Event Query
   A. Introducing the Query Events Form
   B. Establishing Query Criteria
   C. Modifying & Saving Queries
   D. Generating Prints from the Query Results Screen

IV. Tracking Food/Service Items
   A. Running a Food/Service Activity Query
   B. Generating a Food/Service Items Report

V. Tracking Payment Activity
   A. Payment Activity Query
   B. Generating a Payments Made Report

VI. Morning Break

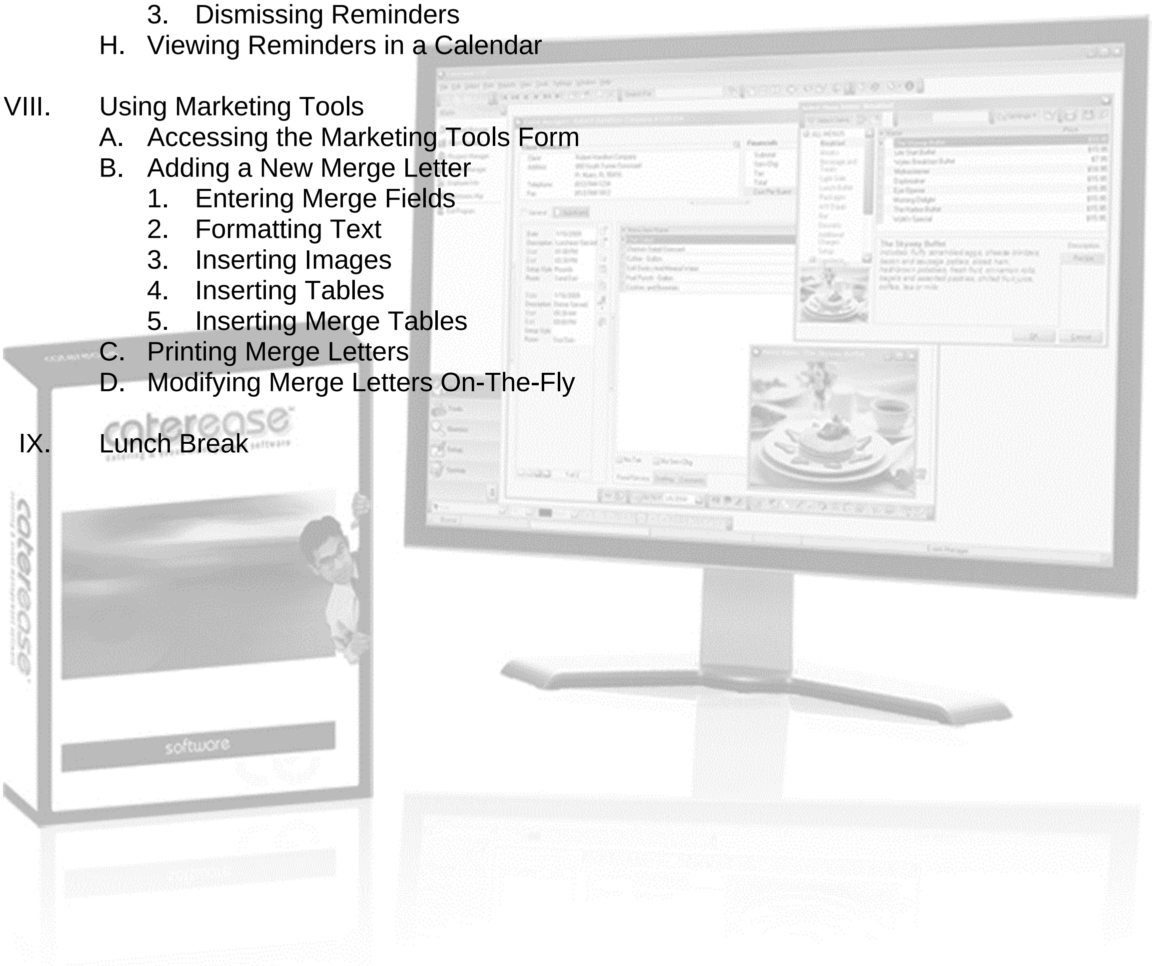
Caterease Training Syllabus

Day Two

VII. Contact Manager Introduction
   A. Creating a Reminder in Event Manager
   B. Creating a Contact History Note in Event Manager
   C. Creating a History Note While Sending a Contract
   D. Creating Reminders/History Notes in Account Manager
   E. Reviewing the Contact Manager Screen
   F. Creating Auto Reminders
   G. Managing Current Reminders
      1. Setting Days Out View for Reminders
      2. Responding to Reminders
      3. Dismissing Reminders
   H. Viewing Reminders in a Calendar

VIII. Using Marketing Tools
   A. Accessing the Marketing Tools Form
   B. Adding a New Merge Letter
      1. Entering Merge Fields
      2. Formatting Text
      3. Inserting Images
      4. Inserting Tables
      5. Inserting Merge Tables
   C. Printing Merge Letters
   D. Modifying Merge Letters On-The-Fly

IX. Lunch Break



Caterease Training Syllabus

v.11

Day Two

Afternoon Session

The afternoon session on Day Two covers setup of the program – from building and editing custom menus to creating custom event prints, to modifying quickpick lists, security restrictions and a variety of other details. When this session is done, students will be able to:

- *Create and modify custom event prints*
- *Add new menus and menu items*
- *Setup system security, including users and user groups*
- *Customize the program's many quickpick lists*
- *Make various fields required*
- *Create defaults for new bookings*
- *Establish default tax/service charge rates*
- *Setup site locations and/or banquet rooms*

I. Using the Print Designer
   A. Customizing Existing Prints
   B. Creating a New Print
   C. Customizing Text Blocks in a Print
   D. Formatting Food/Service Items in a Print
   E. Advanced Print Settings

II. Adding New Food/Service Menus to Caterease
   A. Adding New Menus
   B. Adding Menu Items
   C. Creating Menu Packages

III. Setting Up System Security
   A. Accessing System Security
   B. Establishing the Administrative Password
   C. Adding Caterease Users & Passwords
   D. Establishing Individual Access Rights
   E. Creating User Groups

IV. General Program Setup
   A. Customizing Quickpick Lists
   B. Establishing Required Fields
   C. Creating User Defined Fields
   D. Setting New Booking Defaults
   E. Establishing Default Tax Rates
   F. Configuring Global Settings
   G. Customizing the Scratch Pad
   H. Adding to the Site Locations Database
   I. Creating Banquet Rooms/Setup Styles
   J. Establishing Setup Styles/Capacities
   K. Blocking Banquet Rooms

V. Retrieving/Removing Deleted Events

VI. Performing a Backup
   A. Saving Backups to Remote Locations
   B. Emailing & Auto-Deleting Backups

VII. Q & A

caterease™
catering & event management software