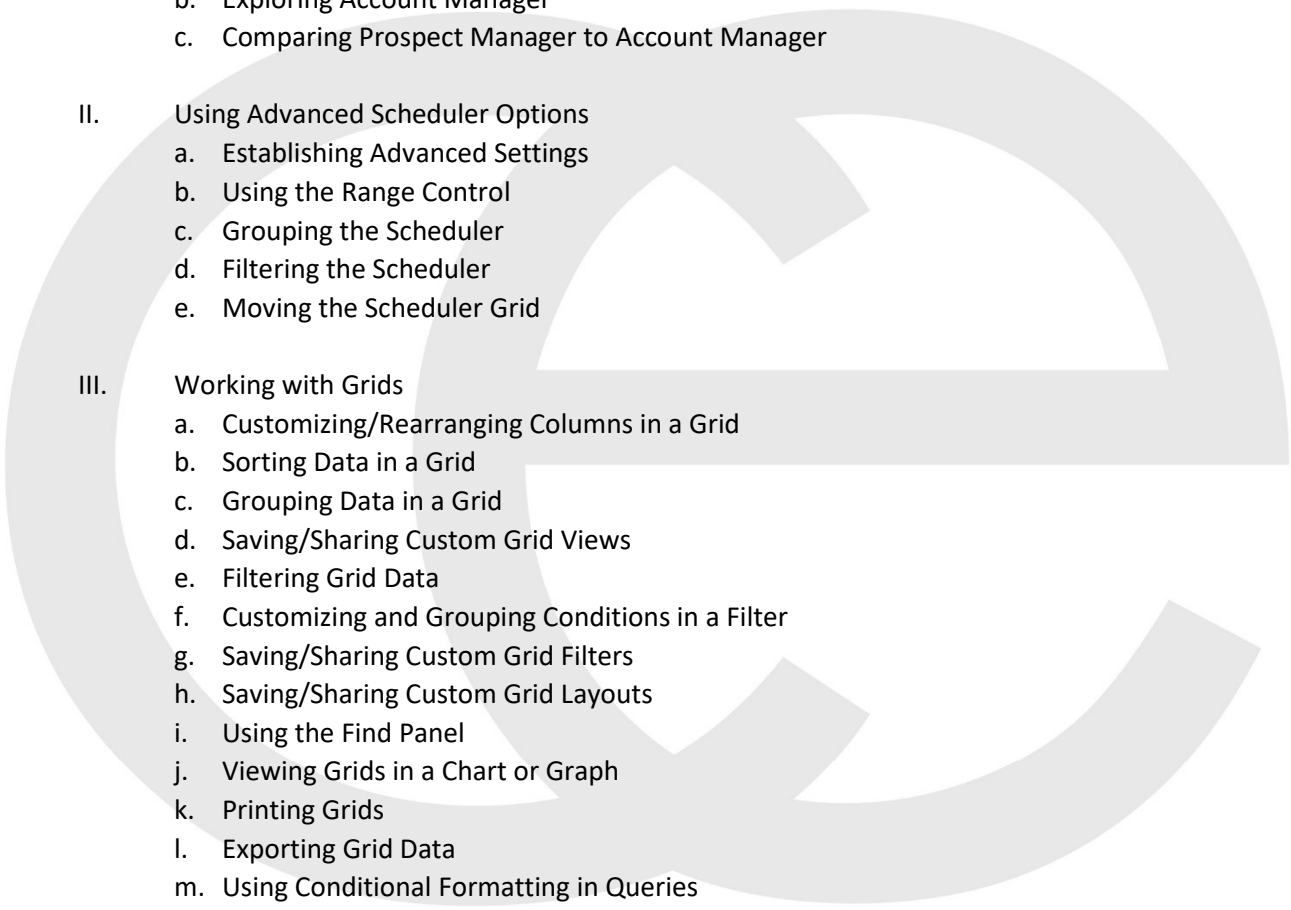


CaterEase Regional Training Syllabus – Level 2

Day 1 – Morning

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- I. Reviewing the Basics
 - a. Exploring Event Manager
 - b. Exploring Account Manager
 - c. Comparing Prospect Manager to Account Manager

 - II. Using Advanced Scheduler Options
 - a. Establishing Advanced Settings
 - b. Using the Range Control
 - c. Grouping the Scheduler
 - d. Filtering the Scheduler
 - e. Moving the Scheduler Grid

 - III. Working with Grids
 - a. Customizing/Rearranging Columns in a Grid
 - b. Sorting Data in a Grid
 - c. Grouping Data in a Grid
 - d. Saving/Sharing Custom Grid Views
 - e. Filtering Grid Data
 - f. Customizing and Grouping Conditions in a Filter
 - g. Saving/Sharing Custom Grid Filters
 - h. Saving/Sharing Custom Grid Layouts
 - i. Using the Find Panel
 - j. Viewing Grids in a Chart or Graph
 - k. Printing Grids
 - l. Exporting Grid Data
 - m. Using Conditional Formatting in Queries
 - n. Batch Processing
 - o. Batch Printing
 - p. Building Custom Queries
 - q. Using Advanced Queries
 - r. Using Grids in Managers

MORNING BREAK (10:30 A.M.-10:45 P.M.)

- IV. Grid Exercises



CaterEase Regional Training Syllabus – Level 2

Day 1 – Morning, Continued

- V. Customizing Toolbars/Screens
 - a. Customizing the Tools Menu
 - b. Customizing the Tools Bar
 - c. Quick-Layout Customizing
 - d. Viewing the Customize Window
 - e. Saving/Sharing Window Settings
 - f. Saving/Sharing Layouts
 - g. Customizing the Client and Financial Details
 - h. Customizing the Sub-Event Display
 - i. Creating Multiple Event Wizard Layouts

- VI. Setting Up Default Menus
 - a. Managing Item Inventory
 - b. Performing a Manual Inventory Check in Event Manager
 - c. Establishing Minimum, Default, and Linked Quantities
 - d. Applying a Base Price Markup to an Account and Site Location
 - e. Customizing and Accessing Item Types
 - f. Copying Menus in Menu Manager
 - g. Setting Up Automatic Menu Packages
 - h. Using the New Food/Service Window in Event Manager
 - i. Using Expanded View in Event Manager
 - j. Printing Item Labels

LUNCH (12:00 P.M.-1:00 P.M.)

CaterEase Regional Training Syllabus – Level 2 Day 1 – Afternoon

VII. Menu Exercises

VIII. Building Ingredients Lists

- a. Adding an Ingredient List Category
- b. Adding an Ingredient Items
- c. Building Sub-Recipes
- d. Creating Item-Specific Units
- e. Creating Custom General Units
- f. Assigning Ingredients to Menu Items
- g. Modifying Ingredients in an Event

IX. Building Required Items Lists

- a. Adding a Required Item List Category
- b. Adding a Required Item
- c. Inventorying Required Items
- d. Assigning a Required Item Cost and Packing Unit
- e. Assigning Required Items to Menu Items
- f. Modifying Required Items in an Event

X. Ingredients/Required Items Exercises

AFTERNOON BREAK (2:30 P.M.-2:45 P.M.)


XI. Managing Scheduled Items

- a. Selecting Scheduled Items for an Event
- b. Viewing and Managing Scheduled Items in the Scheduler
- c. Creating a Default List of Items
- d. Renaming Items for Scheduling

XII. 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. Using the Notifications Backstage Tab

CaterEase Regional Training Syllabus – Level 2 Day 1 – Afternoon (Continued)

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- XIII. Using the Audit Trail
 - a. Enabling the Audit Trail
 - b. Printing an Audit Trail for One Event
 - c. Generating an Audit Trail Report for a Date Range

 - XIV. Account Manager
 - a. Applying Default Allergy Information
 - b. Viewing & Printing Allergy Alerts
 - c. Combining Duplicate Accounts
 - d. Assigning Master Accounts
 - e. Importing Account Lists
 - f. Importing Event Details

 - XV. 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



CaterEase Regional Training Syllabus – Level 2 Day 2 – Morning

- I. Customizing Prints/Miscellaneous Prints
 - a. Accessing Print Designer
 - b. Adding a New Print
 - c. Selecting a Print Layout
 - d. Editing the Header or Footer of a Print
 - e. Selecting Fields on the Print
 - f. Customizing and Suppressing General Information
 - g. Editing Top and Bottom Notes Sections
 - h. Changing Print Fonts
 - i. Grouping Information on Prints
 - j. Copying Prints
 - k. Accessing Prints in Miscellaneous Prints Designer

- II. Creating Custom Merge Documents
 - a. Adding a New Merge Document
 - b. Adding Merge Fields to a Document
 - c. Using Formatted Date Fields
 - d. Inserting a Table into a Document
 - e. Using Merge Tables to Insert Menu Items, Payments, Etc.
 - f. Using Nested Tables to Arrange Information in a Document
 - g. Using Merge Formulas

- BREAK (10:30 A.M.-10:45 A.M.)**

- III. Custom Print Exercises

- IV. Creating Email Templates
 - a. Building an Email Template
 - b. Saving Custom Templates

- V. Using the Print Selection Tool
 - a. Generating Prints from the Print Selection Tool
 - b. Modifying Event Sub-Prints On-the-Fly
 - c. Generating a Print for Selected Sub-Events
 - d. Generating Multiple Prints Simultaneously

CaterEase Regional Training Syllabus – Level 2 Day 2 – Morning (Continued)

- VI. Reviewing Cost/Profit of an Event
 - a. Reviewing the Event Costing Summary
 - b. Changing Line Item Costs
 - c. Updating Event Costing Based on Ingredients
 - d. Applying Discounts to a Party
 - e. Displaying Discounts on the Event Manager Screen

LUNCH (12:00 P.M.-1:00 P.M.)

CaterEase Regional Training Syllabus – Level 2 Day 2 – Afternoon

- VII. Scheduling Future Deposits for a Party
 - a. Adding Scheduled Event Deposits
 - b. Creating Default Conditional Deposit Schedules
 - c. Setting the Program to Update Deposits Due Automatically
 - d. Including Deposits on the Contract
 - e. Running a Deposits Due Report
 - f. Generating the Deposits Due Query

- VIII. Managing Staff for Events
 - a. Creating Default Shifts or Positions
 - b. Establishing Shift Rules
 - c. Adding Employees
 - d. Assigning a Position to an Employee
 - e. Setting Employee Work Schedules and Vacations
 - f. Customizing the Shift and Employee Grids
 - g. Printing a Staffing Sheet for an Event
 - h. Printing a Scheduled Shifts Report
 - i. Printing an Employee Staffing Schedule
 - j. Managing Multiple Shifts Using the Shift Wizard

- IX. Using the CEC Mobile App
 - a. Creating the List of App Users
 - b. Finding and Downloading the App
 - c. Using the App Tools

- X. 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)