

Setup and installation instructions

Installation Procedure

Insert the CD into the CD-Rom and it will auto run the installation process. If the CD does not auto run the program then use the following instructions.

1. Click 'Start' on the tool bar
2. Click on 'RUN'
3. Type d:\install.exe assuming d: is your cd-rom if not use the appropriate letter for the drive.

If this is your first time loading the program you will need to follow these next few steps.

Insert PTS PRO32 program CD into the CD or DVD drive

1. You will see a screen "Welcome to the PTSPRO Setup Wizard. Click <NEXT> to begin.
2. The default folder is C:\Program Files\PTSPRO\ If this path is not followed then the evaluation version will not work correctly. We highly recommend that this default pathway is used for the full version too.
3. 'Confirm Installation' screen needs only to have the <NEXT> key clicked to proceed.
4. After the installation is complete click <CLOSE> to finish.

On the desktop you will now find a new Shortcut to PTSPRO32.exe . Double click this to begin. If you have the evaluation version you will be asked if you wish to register the program each time it loads. To answer 'YES' you will need to contact registration at 716-200-4792 and give us the registration code on your screen. This code is sensitive to time and day to work. Next, if an old data base is found you must decide to copy the old or use it. . If yes then the old data is copied to dbMail.old and the new data base must be selected to be installed. If no data base is found a new data base must be installed. Click on 'Yes' and choose dbMain-blank.mdb .This will allow to start building your companies scheduling program.

If you are upgrading you must choose to 'Uninstall' not 'Repair' the program. When you use the Uninstall, the data base and settings will remain unchanged.

NOTE: The default Username and password are both 'admin' if you or an employee ever delete all access to the database you need to call tech support to fix it.

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Program Set Up

To book your first party or event you need to do the following. Each one will give you basic setup examples, definitions and how to get to the form itself. Remember that any thing you do now can be edited, undone or added to at any time. Blue colored text can be clicked on enabling you to see a better definition for the form you are looking at.

Click on file >>Setup>>Preferences

The help me button, located in the lower right of the window, will provide you with help on the field in these two tabs. After you have input the company information you are ready for the next step.

Click on file >>Setup>>List

The following are found in the List Name drop down.

Note: *You must set up each of these lists before you can do certain things within the system.*

AREAS - Input seating areas by name, number or both according to your facility set up.

CREDIT - Input names of the credit cards you are accepting payment from.

CATEGORY - Define additional party options or 'extras' which can include food, candles, theme party ware, piñatas, goody bags or anything you sell as a party extra including pricing.. If this list is not done before the extras definition, there would be no categories to choose from. Categories can be chosen and assigned at any time.

OPTIONS are the no charge extras you might use for a party, such as a special gift for the birthday child or a free pass, etc.

Click on file>>>Set up>>>Extras

EXTRAS designated in your CATEGORY lists is a method of sorting. This is where you will define your extra items added on to the party or event, and the designated category they belong in, whether it's food, decorations, a special order, etc...

Click on file >>>Party Types

The Define Party Parameters window is where you select the day of the week for this definition to show in. Check the box marked 'Enable Options' if you have a theme choice or are planning to use the option drop down list. You can choose to change these options at any time. Now set the price as needed. If you have a per guest price, only enter a price in the 'Cost Per Guest' window. If you are using the package price, i.e. up to 8 kids included in the party package and \$x.xx for each additional then you would enter the \$x.xx into the 'Base Cost' and the 8 guests into the 'Exclude First (8) Guests.

Click on file >>Setup>>Reservations

This is where we set up the schedule for booking the events.

Select Sunday by clicking on the word Sunday. Now click the new key (icon of a sheet of paper). The Start time and End time are defaulted to 10 am and 12 pm respectively. The 'Always Available' is the on / off for the next field below called 'Unavailable if this slot is taken'. It is best to leave these two parts at default until you better understand the program.

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'Set Display Color' is just that, it sets the color of the slot and is great when you need to have a color coded booking system as well as time slots.

The 'Default Area' is from the list you made earlier in the setup. Choose the default and no area will be shown. If you wish to pre-assign an area, this is where you would do it.

The comments written here show up in the comments field of the reservations edit window and on the scheduler too. They will also print in your comments field on your day of party bill. These are removable as you book the party but are a great way to let employees know when special instructions are to be followed.

Now that you have made your first time slot for the first day you need to make about a hundred more! We made that easy!. If you need several time slots the same just click the button 'Make Time Slot' as many times as you need. Now before you make too many of the same time remember to change the Start Time and End Time as your company needs. When all time slots are made or you have all you need to start, click on the 'Exit' button. To make the rest of the week use the 'Copy Day' key on the menu bar. Highlight the day you have already made and need to copy and then click on the 'Copy Day' button. Choose the day to 'Copy To' from the drop down list. Click 'OK' and do this for any number of days as needed. This simple method of duplicating schedules from one day to the next, allows you quick set up for the weekly scheduled time slots. This duplicated list may be edited, on any day, to create additional time scheduling. Use the 'Is Available' field to make a time slot unavailable. An 'X' in the field means it's available for booking, an empty field makes that time slot unavailable.

To set up users click on file>>Setup>>Users

Type in the users name, password, initials, key code and full name. The initials show up whenever this user has been asked for their Key code. The key code can be changed as needed to help with security of the individuals access rights. The key code must be unique to each user. The system will protect you from duplicating key codes. The five groups and their items are very self explaining. For example, if you need a user to be able to access and update the holiday list then you search for their name (icon with magnifying glass), select it and then click on the 'Holiday' check box. The next time that user logs in the Holiday option will be enabled for them to access and change as needed. The user's initials will follow the reservation, tracking who took the deposit and when.

The last thing to set up are the printouts for the 'Party Agreement' and the footer of the 'Day of Party Bill'. To set these up go to c:\Program Files\PTSPPro and using your Microsoft Word program, open up the contract.rtf and the dop_footer.rtf files and edit them as needed. To learn more and see examples of these files click [here](#).

Now that you have set up your system click on the calendar icon on the right hand side of the screen. It is labeled Schedule. This will bring up the current days schedule. You are now ready to book your first party or event.

Good luck and happy scheduling.