

# USER GUIDE

**CATERSOFT<sup>®</sup>**  
RESERVATION MANAGEMENT SYSTEM

CATERSOFT, LLC  
2227 Belleview Terrace  
Oklahoma City, OK 73112

Internet: [info@catersoft.com](mailto:info@catersoft.com)  
Technical Support: [support@catersoft.com](mailto:support@catersoft.com)

#### **Trademarks**

All trademarks used herein are the properties of their respective owners.

#### **Warranty**

Catersoft warrants that the original CD is free from defects in material and workmanship, assuming normal use, for a period of 90 days from the date of purchase. If a defect occurs during this time, you may contact Catersoft and it will be replaced at no charge.

Every attempt has been made to ensure that the information contained in this manual is correct as of the time it was written. We are not responsible for any errors or omissions.

Information in this document is subject to change without notice and does not represent a commitment on the part of Catersoft. Catersoft's liability is limited to the amount that you paid for the product. Catersoft is not liable for any special, consequential, or other damages for any reason.

#### **Copying and Distribution**

Please read the *License Agreement* presented during installation of the product. The product may only be used under the terms of the *License Agreement*.

Copyright © 2002 Catersoft, LLC. All rights reserved.

Printed in the United States of America

Book cover, layout, and logo created by  
Jarvis Design 405.224.1664 or [sjarvis@itlnet.net](mailto:sjarvis@itlnet.net)

# TABLE OF CONTENTS

- WELCOME..... 5**
  - About Catersoft..... 5
  
- RMS FEATURES ..... 7**
  
- INSTALLING RMS ..... 9**
  
- GETTING STARTED ..... 11**
  - Registering RMS ..... 11
    - Registration Screen ..... 11
    - Initial Setup ..... 11
    - Entering Your First Function ..... 12
    - Look-Up Existing Functions ..... 12
  
- REFERENCE..... 13**
  - Opening Functions ..... 13
  - Equipment Needs ..... 14
  - Finding Functions ..... 15
  - Entering Functions ..... 17
    - Entering Functions - Contact Page ..... 17
    - Entering Functions - Function Page ..... 18
    - Entering Functions - Pricing Page ..... 18
    - Entering Functions - Equipment Page ..... 18
    - Entering Functions - Left Menu Page ..... 18
    - Entering Functions - Right Menu Page ..... 19
    - Entering Functions - Comments Page ..... 19
  - Repeating Functions ..... 21
    - Creating Repeating Functions ..... 21
    - Printing Repeating Functions List ..... 21
    - Deleting Repeating Functions ..... 21
  - Menu Creator ..... 23
    - Menu Creator Introduction ..... 23
    - Menu Creator ..... 23
    - Setup Menu Items ..... 23

Letter Creator .....	25
Letter Creator Introduction .....	25
Letter Creator .....	25
Program Setup Menu .....	27
File > Setup Menu .....	27
Setup Available Equipment .....	27
Setup Rooms/Locations .....	28
Setup Menu Types, Bars, Table Arrangements, Head Tables, Cloths Napkins .....	28
Utilities Menu .....	29
File > Utilities Menu .....	29
Compact Database .....	29
Backup/Restore Database .....	29
Program Options .....	31
View > Options .....	31
General Options Page .....	31
Club Information Option Page .....	31
Printing Options Page .....	32
Function Defaults Option Page .....	32
Terms and Conditions Option Page .....	32
E-Mail Settings Option Page .....	32
Fax Printing Option Page .....	33
Multi-User Features .....	35
Multi-User Option Introduction .....	35
Login .....	35
Changing Your Password .....	35
User Maintenance .....	36
<b>TRIAL HELP .....</b>	<b>37</b>
Initialize First Time (Welcome) .....	37
Valid Usage (OK Cancel) .....	38
Extension Window of Valid License .....	38
Expired .....	38
Date Set Back .....	38
Invalid Trial Database (Corrupt) .....	38
<b>INDEX .....</b>	<b>39</b>

# WELCOME

Welcome to **Reservation Management System**, the quickest, easiest way to book banquets. Using standard menu choices like New, Open, Save, and Print, you can easily create, manage and print your events.

**Familiar Environment - Reservation Management System** works just like your other Windows-based software. You will find the menu system and toolbar resemble popular word-processing and spreadsheet programs. This translates to a much lower learning curve than competing products. You can be productive in **Reservation Management System** in minutes.

## About Catersoft

**Catersoft's** sole purpose is creating quality software for companies that book banquets. Catersoft was formed from Private Club Computing which was founded in 1990. Our software is intuitive and easy to use because it was designed by people in this industry.

**Reservation Management System** has evolved over the years with the help of our customers. We continue to ask for suggestions on how we can improve our software.

If you have any questions about obtaining the software, please contact your sales representative or contact us at [info@catersoft.com](mailto:info@catersoft.com). If you need help using or installing the software, contact us at [support@catersoft.com](mailto:support@catersoft.com).

If you have any questions, please contact Catersoft or your sales representative. Thank you.



Catersoft, Reservation Management System, and the Catersoft waiter with a computer are trademarks of Catersoft, LLC.



# RMS FEATURES

These are some of the many features of **Reservation Management System** that will make your job easier:

- Work on multiple functions at the same time
- Multiply function feature makes it easy to book a party over a range of dates. For example, Multiply allows you to book a party on every 1<sup>st</sup> and 3<sup>rd</sup> Monday for the next year!
- Re-book parties from the past in minutes!
- Handy function finder allows you to locate parties in the past and future based on different criteria
- Daily schedule report for your staff that tells them just what they need to know about the day's events including last minute comments
- Graphical room schedule allows you to see room availability at a glance
- Create "Repeating Functions" for groups or events that are booked frequently. With the click of only one button, you can have your function booked!
- Customizable menu creator. Create a function's menu without even touching the keyboard.
- Letter Creator. Design form letters with drag and drop ease.
- Save entire menus with one click. Then, print out selected menus to make menu proposals.
- Intuitive, familiar looking Windows® interface
- Multi-user network option





# INSTALLING RMS

## Installation Requirements      Installation

Reservation Management System is a 32-bit Windows® program. The following system requirements are recommended:

- Microsoft Windows 95, Windows 98, Windows ME, Windows NT 4.0, or Windows 2000, Windows XP, or later.
- Minimum RAM: 64MB
- Processor: 166MHz Pentium (233MHz Pentium II or greater is recommended)
- Minimum hard disk drive space: 20MB

If your system does not meet these requirements, the program may not run correctly.

Insert the CD into the CD or DVD drive.

or

If the setup program does not automatically start then follow these steps:

- 1 Click Start on the Taskbar
- 2 Choose Settings
- 3 Choose Control Panel
- 4 Double click on Add/Remove Programs
- 5 Click on Install

Follow the setup program's directions to complete the installation.

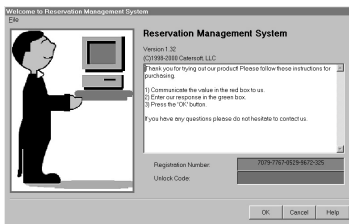


# GETTING STARTED

## Registering RMS

### Registration Screen

From the main menu, choose **Help > RMS Registration...**



The number that is in the red box needs to be communicated back to Catersoft®. We will give you an unlock code for you to type in the green box and then click the **OK** button.

For another convenient way to register, choose **Help > Print Registration Form**, from the main menu.

## Initial Setup

Before booking events, there are several lists of items that should be updated to reflect your particular needs.

From the main menu, choose **File > Setup**. This menu shows the categories of items that can be customized.

- Available Equipment - Equipment that can be used by during a function, e.g.: PA Systems, Podiums, Flowers, Overhead Projectors, etc.
- Rooms/Locations - The locations of the functions
- Bars - Types of bars available, e.g.: Cash Bar, Cocktails, Signature Bar
- Head Tables - Types of head tables available
- Table Arrangements - Common ways to arrange tables, e.g.: U-Shaped, Theater, Rounds, etc.
- Napkins - Available colors for napkins
- Table Cloths - Available colors for table cloths


Also from the main menu, choose **File > View**. This is where the custom **Menu Creator** and the custom **Letter Creator** are found.



- Menu Creator - This is a list of available menu items for the pop-up menu creator

- Letter Creator – This is where custom form letters are created and edited with drag and drop ease

**Note:** If the multi-user option has been installed, be sure to set the common database location in the **General Options Page** of the Program Options dialog box. See the Multi-User Option Introduction section for additional information.






## Entering Your First Function

- 1 From the main menu, choose **File > New** or click **New** .
- 2 Fill in the all necessary fields in the **New Function** window




- 3 From the main menu, choose **File > Save** or click **Save** .
- 4 From the main menu, choose **File > Print** or click **Print** .
- 5 It is that easy!

Go to Entering Functions for more detailed information about how to enter functions and what you can do with them.

## Look-Up Existing Functions

- 1 From the main menu, choose **File > Open** or click **Open** .
- 2 Choose a date range, if necessary.
- 3 Click on one of the functions in the list area.
- 4 Do one or all of the following:
  - Preview the Function  
From the main menu, choose **File > Print Preview** or click **Preview** .
  - Print the Function  
From the main menu, choose **File > Print** or click **Print** .
  - E-Mail the Function  
From the main menu, choose **File > Send** or click **Send** .
  - Print Letters about the Function  
From the main menu, choose **File > Print Letters...** or click **Letters** .


or

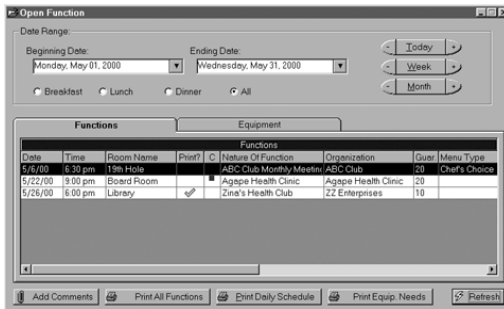
- Click **Delete**  to remove the function.
- Click **Copy**  to copy the function to another location, date, and/or time.
- Click **Multiply**  to replicate the function. For example, use Multiply to book the function on every other Tuesday for the next year.



Go to Opening Functions for more information about opening functions.


# REFERENCE

## Opening Functions

From the main menu, choose **File > Open** or click **Open** .




This is the main window into managing functions. The grid shows the functions based on the selected date range and time period. The green check mark  in the **Print?** column shows that the function has been printed. If the function is later changed, the check mark will be removed. The blue box  in the **C** column indicates that a last minute comment has been attached to that particular function. Click the **Add Comments** button to add, change or delete a last minute comment. Last minute comments are printed on the **Daily Schedule**.

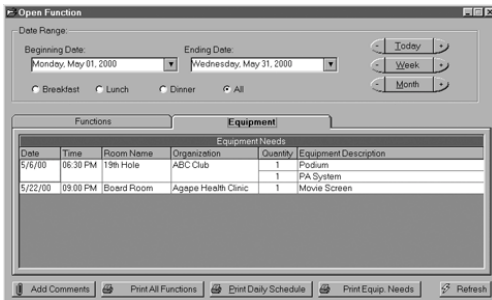
Whenever functions are displayed in the grid, any of the tool bar buttons can be used on the highlighted function. For example, the first function is highlighted. To copy this party to another day, press the **Copy**  button.

Using the **Open Function**  window:

- 1 Select the date range by either setting the beginning and ending date or using the **Date Jump Buttons** on the right.
- 2 Use the left mouse button to choose a particular function, and use the tool bar to print, delete, copy, etc the function.
- 3 Click the **Print Daily Schedule** button to print out a daily schedule for all of the days in the selected date range. See the General Options page for the setting to print the Daily Schedule on individual pages, or not.
- 4 Click the **Print Multiple Functions** button to print function sheets for all of the functions in the selected date range.
- 5 Click the **Print Equip. Needs** button to print a list of the equipment required for the functions in the selected date range.

## Equipment Needs

From the main menu, choose **File > Open** or click **Open** . Click on the **Equipment** tab.




Equipment Needs					
Date	Time	Room Name	Organization	Quantity	Equipment Description
5/6/00	06:30 PM	19th Hole	ABC Club	1	Podium
5/22/00	09:00 PM	Board Room	Agape Health Clinic	1	PA System
					Movie Screen

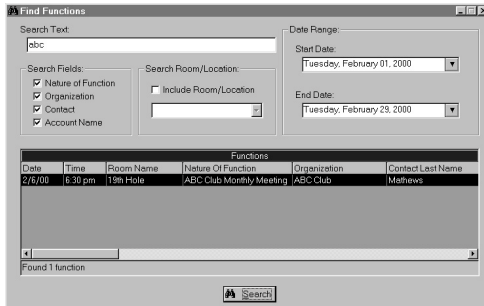
Using the **Open Function**  window:

- 1 Select the date range by either setting the beginning and ending or using the **Date Jump Buttons** on the right.
- 2 Click on the **Equipment** tab.


The equipment needed for all of the functions in the selected date range will be shown in the grid. Click **Print Equipment Needs** for a hard copy.

## Finding Functions

From the main menu, choose **View > Find Functions** or click **Find** .




Date	Time	Room Name	Nature Of Function	Organization	Contact Last Name
2/3/00	6:30 pm	1st Hole	ABC Club Monthly Meeting	ABC Club	Midreus

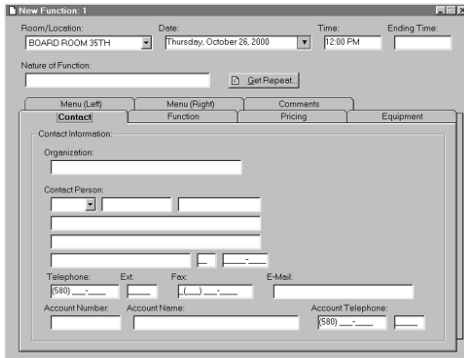
- 1 Type your search word in the **Search Text** box. Enter the asterisk, “\*”, to find all events.
- 2 Choose which fields to search by checking the fields in the **Search Fields** list.
- 3 Check **Include Room/Locations** and select the room/location to search (optional).
- 4 Select the date range.
- 5 Click **Search** .
- 6 Double click on any found function to open or use the tool bar to print, copy, multiply, delete, etc. You way also click the right mouse button for a pop-up menu in the grid. From there you can delete all of the functions with one click.






## Entering Functions


From the main menu, choose **File > New** or click **New** 







Enter the room, date, and beginning time of the function. Use the Setup Rooms/Locations window to manage rooms and locations. The date may be entered as “MM/DD/YYYY”. The time can be entered as 12-hour or 24-hour time. If 12-hour time is used, be sure to put a space between the last minute digit and the “AM” or “PM”. Also, do not use periods with the “AM” or “PM” designator. If the function is going to be booked too close to an already booked function, a warning box will pop-up. The minimum spacing between functions is set using the Options dialog box.

Enter a description for the function in the **Nature of Function** field. This field is the main description for the function that is used throughout the program.

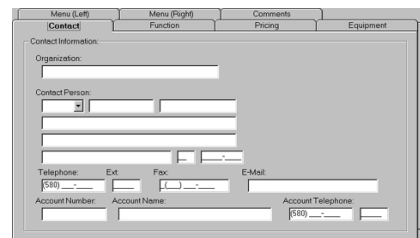
Press the **Get Repeat** button  **Get Repeat...** to pull all of the remaining function informa-

tion out of the Repeating Functions file. This is how a repeating function can be re-booked in only seconds. To make repeating functions, choose **View > Repeating Functions...** or click **Repeat**  on the main menu. See the help section Creating Repeating Functions for more information.

To continue adding function information, click on the Contact, Function, Equipment, Left Menu, Right Menu, and/or Comments tabs.

When finished, choose **File > Save** or click **Save** . Next, click on **Print**  **Preview** , **Send** , etc. You may also choose a function action from the **Actions** menu or click any of the available action buttons on the toolbar.

## Entering Functions - Contact Page



Enter the contact information for the function. Be sure to include the contact person’s e-mail address, if the draft of the function sheet will be sent via e-mail. Use the Options dialog box to setup your e-mail information. The fax number field has an extra leading space to allow for a “1” or a “0” to denote long-distance dialing.

## Entering Functions - Function Page

The screenshot shows the 'Function' page with the following fields and options:

- Guarantee:** [ ]
- Set For:** [ ]
- Menu Type:** [ ]
- Bar:** [ ]
- Bar Time:** [ ]
- Wine:** [ ]
- Setup Information:**
  - Tables:** [ ]
  - HeadTable:** [ ]
  - Cloths:** [ White ]
  - Napkins:** [ White ]

Enter the general information about the function. The **Menu Type** field allows you to set a general menu type for the function. For example, you may choose “Set Menu,” “Order Off the Menu,” etc. The menu types are managed through the Setup Menu Types window. There is a special menu type “No Menu.” Use this type to flag a function that does not have a complete menu. From the Options dialog box, you can choose to exclude these functions when printing out a group of functions sheets from the Open Functions window. The **Menu Types** field also displays in the Open Functions window.

## Entering Functions - Pricing Page

The screenshot shows the 'Pricing' page with the following fields and options:

- Price:**
  - Price per Person for Food:** \$0.00
  - Setup Charge:** \$0.00
- Deposit:**
  - Deposit Required
  - Deposit Amount:** \$0.00
  - Deposit Due Date:** Thursday, November 09, 2000
- Function Payment:**
  - Send Payment: \$0.00
  - Special Billing
  - Tax Exempt: [ ]

Enter the pricing information about the function. The **Deposit Due Date** field defaults to a certain number of days from

the day the party is booked. The default number of days is set in the Options dialog box. The **Deposit** and **Send Payment** information will only print on the function sheet, if they are greater than zero.

## Entering Functions - Equipment Page

The screenshot shows the 'Equipment' page with two grids:

Available Equipment		
Code	Description	Price
1	3 EASELS	\$3.00
100	Plate	\$0.00
101	2 TV & VCR	\$110.00
102	2 SCREEN	\$0.00
103	2 OVERHEAD PROJECTOR	\$70.00
110	0 TELEPHONES	\$00.00

Below the grid is an **Add** button. The bottom grid is titled "Equipment Required for Function" and is currently empty, with a **Remove** button below it.

In the top grid click on the piece of available equipment that the function will require, then click on the **Add** button. Repeat this for each piece of equipment that is required. The bottom grid will show all of the equipment allocated to the current function. To remove a piece of equipment, click on the piece in the bottom grid and then click on the **Remove** button.

Use the Setup Available Equipment window to manage what equipment can be used for a function.

## Entering Functions - Left Menu Page

Use the **Left Menu** page to enter the text that will appear on the left half of the menu. Use the Options dialog box to set the number available lines. When the cursor is in the left menu field, click the right mouse button to pop-up a menu of editing functions that includes spell-checking.

The Menu Creator is available in the **Left Menu** field to make building menus fun and easy.

Click on the **Save Menu** button to save the contents of the **Left Menu**, **Right Menu** and **Comments** page as a saved menu. Click on the **Retrieve Menu** button to retrieve an entire menu that consists of the left menu, right menu, and comments. Use this feature to save pre-setup menus that might be used often. After several full menus have been saved, then use the **Menu Proposal Report** (on the main menu click **Reports > Menu Proposal Report**) to print out selected menus and create a quotation for prospective functions.

## Entering Functions - Right Menu Page

Use the **Right Menu** page to enter the text that will appear on the right half of the menu. Use the Options dialog box to set the number available lines. When the cursor is in the right menu field, click the right mouse button to pop-up a menu of editing functions that includes spell-checking.

The Menu Creator is available in the **Right Menu** field to make building menus fun and easy.

## Entering Functions - Comments Page

Use the **Comments** page to enter the text that will appear below the left and right

menu sections on the printed function sheet. Use the Options dialog box to set the number available lines. When the cursor is in the comments field, click the right mouse button to pop-up a menu of editing functions that includes spell-checking.



The Menu Creator is available in the **Comments** field to make building menus fun and easy.

Type the name and position of the person booking the party on behalf of your company. You can set the default name and position by using the Options dialog box.

## Repeating Functions



### Creating Repeating Functions

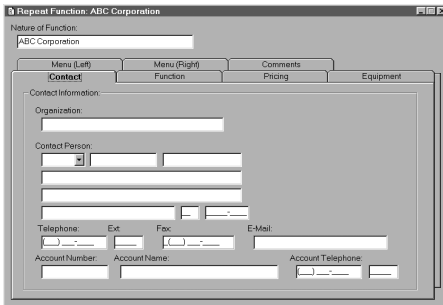
- Create a Repeating Function from a blank form:

From the main menu, choose **View > Repeating Functions...** or click **Repeat** , then click **New Repeat** .


or

- Create a Repeating Function from an existing function:

With an existing function open, choose **Actions >  Create Repeating Function...** Now open the new repeating function from the main menu by choosing **View > Repeating Functions...** or clicking **Repeat**  on the tool bar.



Use this window to store entire functions that repeat with some regularity. The **Nature of Function** field provides the name of the stored function. See Entering Functions for a detailed explanation of the entry fields and how to retrieve a repeating function. Enter all of the desired fields and


choose **File > Save** from the main menu or click **Save** .


When entering a new function, you can press the **Get Repeat** button to retrieve a repeating function. (Again, see Entering Functions) For example, the ABC Company regularly holds a meeting. If a repeating function has been set up, then booking a new party consists of entering a room/location, date, time and then retrieving the repeating function from the list. The party can be edited for that specific date, if needed.

### Printing Repeating Functions List

A list of the stored repeating functions can be printed by choosing **Reports > Repeat Function List** on the main menu.

### Deleting Repeating Functions

From the main menu, choose **View > Repeating Functions...** or click **Repeat** .

With the left mouse button, click and highlight the desired function, then click **Delete** .



# Menu Creator

## Menu Creator Introduction

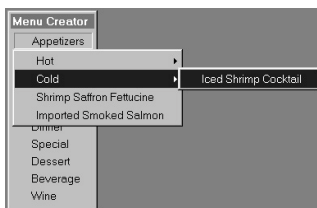
The Menu Creator makes creating custom function menus a snap! The Menu Creator automatically pops-up when there is a menu to be entered. Use the Setup Menu Items window to manage the individual menu items and menu categories.

## Menu Creator

The **Menu Creator** is available when the cursor is in the Left Menu, Right Menu, or Comments section of the Function window.



Menu Creator Main Window



Example of “Appetizers” category that has several items including the “Hot” and “Cold” sub-categories.

Manage the menu items and sub-categories from the Setup Menu Items window.

## Setup Menu Items

From the main menu choose **File > View > Menu Creator** or press **Ctrl-M**.



The menu items entered using this window are included on the Menu Creator when entering or editing a function.

### Add a menu item:

- 1 Click the left mouse button to choose a menu category.
- 2 Type the name of the item in the Menu Item Name box.
- 3 Either choose from the drop-down list or type the name of the Menu Sub Category box.
- 4 Click **Add**

### Remove a menu item:


- 1 Click the left mouse button on the menu item to highlight it.
- 2 Click **Remove**





# Letter Creator

## Letter Creator Introduction

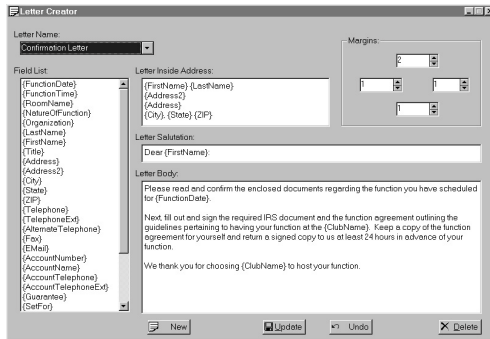
The Letter Creator makes designing custom letters easy. Using drag and drop, you can easily build your letters to say just what you want including personalized information from the individual functions. After the letters are designed, just choose your function and from the main menu, choose **File > Print Letters...** or click **Letters** .


automatically added to the bottom of the letter. The signature line is the **Booked by** field from the Function's Comment window.

- Click Update  to save the letter.

## Letter Creator

From the main menu, choose **View > Letter Creator...**



- Choose the letter to edit from the **Letter Name** drop down list or click **New**  to create a new letter.
- Drag and drop fields from the **Field List** to any of the letter parts. Type any additional text into the letter.
- The salutation and signature line are



## Program Setup Menu

### File > Setup Menu

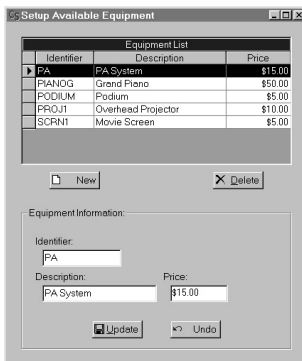
From the main menu choose **File > Setup**.



Use this menu to setup all of the items that have lists associated with them. Each of the following have lists: Available Equipment, Rooms/Locations, Menu Types, Bars, Tables, Head Tables, Cloths, and Napkins.



### Setup Available Equipment

From the main menu choose **File > Setup > Available Equipment** or press **Ctrl-E**.




This is where the equipment available to events is managed. Each piece of equipment has a name which will appear on the function sheet and an internal identifier. The identifier should be a unique internal name, so that multiple pieces of the same type of equipment can be identified. For example, suppose there are two overhead projectors available. Give one of them the identifier “PROJ1” and the other “PROJ2.” They can both have exactly the same description, but this way you can keep track of which projector has been reserved. Only the description prints on the function sheet.

#### Add a piece of equipment:

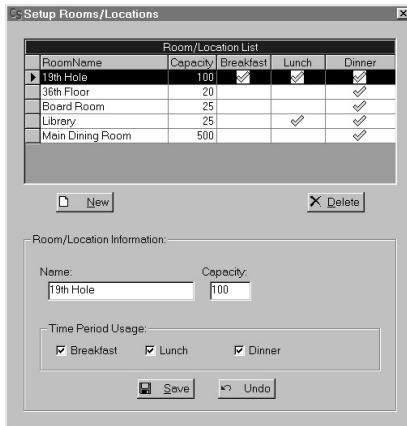
- 1 Click **New** .
- 2 Type the description for the piece.
- 3 Type the internal identifier.
- 4 Enter the price for using the equipment. This can be changed when editing a function.
- 5 Click **Update** .

#### Remove a piece of equipment:



- 1 Click the left mouse button on the piece to highlight it.
- 2 Click **Delete**  to remove.

## Setup Rooms/Locations


From the main menu choose **File > Setup > Rooms/Locations** or press **Ctrl-R**.



### Add a room/location:

- 1 Click **New** .
- 2 Type the name of the room/location in the **Name** field.
- 3 Enter the seating capacity.
- 4 Click on the time periods that the room/location is available.
- 5 Click **Update** .

### Remove a room/location:

- 1 Click the left mouse button on the room/location to highlight it.
- 2 Click **Delete**  to remove.

## Setup Menu Types, Bars, Table Arrangements, Head Tables, Cloths Napkins

From the main menu choose:

**File > Setup > Menu Types**

**File > Setup > Bars**

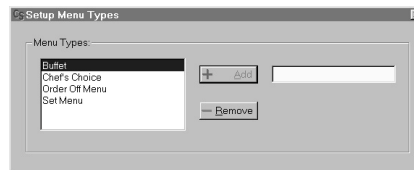
**File > Setup > Table Arrangements**

**File > Setup > Head Tables**



**File > Setup > Cloths**

**or**

**File > Setup > Napkins**



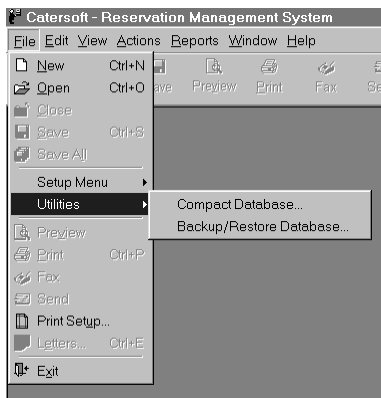
This example shows the form to manage menu types.

Each of these menu choices use a similar form for entering the list items. Type the item name in the entry field on the right and click the **Add**  button. To remove an item from the list, highlight it in the list box on the left and click the **Remove**  button.

## Utilities Menu

### File > Utilities Menu

From the main menu choose **File > Utilities**. If the multi-user option is installed, this menu will only be available to the administrator.



Use this menu to manage the **Reservation Management System** database.

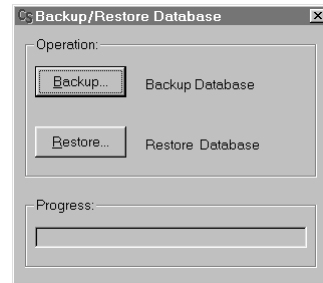
### Compact Database

From the main menu choose **File > Utilities > Compact Database...**

Compact the database to reduce the amount of space that the database file requires. No information in the database is lost. To compact the database, no windows within **Reservation Management System** may be open and no other users may be using **Reservation Management System**.

## Backup/Restore Database

From the main menu choose **File > Utilities > Backup/Restore Database...**



To perform either a backup or restore of the database, no windows within **Reservation Management System** may be open and no other users may be using **Reservation Management System**.

### Backing up the database:

- 1 Click **Backup...**
- 2 Select the file destination.
- 3 Click **Save**.

### Restoring the database:

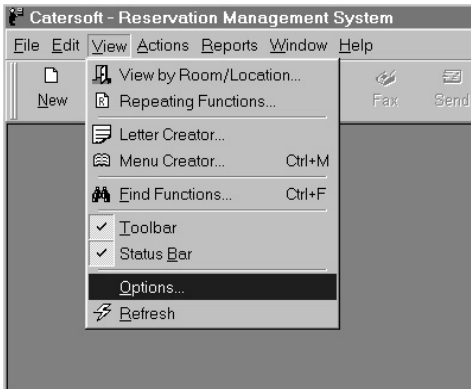
- 1 Click **Restore...**
- 2 Select the backup file location.
- 3 Click **Open**.



## Program Options

### View > Options...

From the main menu choose **View > Options**.



Use this menu to show the **Options...** dialog box. This is where the program's behavior and defaults can be changed.

### General Options Page

- **Minimum Function Spacing**  
Set the minimum amount of time allowed between any two parties booked on the same day at the same location.
- **Open "Open Functions" window on program load**  
Check this box, if you want the Open Functions windows to always open when the program starts.

- **Print Daily Schedule on individual Pages**

Check this box, if you want only one day per page when printing multiple daily schedules.

- **Database Path**

Enter the path to the program's database. (multi-user only)

- **Network Connection**

Enter the share name where the program's database resides. (multi-user only)

- **Auto Connect**

Check this box, if you want the network share to be connected automatically. This allows the program to re-create a broken link to a network drive. (multi-user only)

### Club Information Option Page

- **Club Name**  
Enter the company's name as it should appear on the top of a function sheet.
- **Address**  
Enter the company's address.
- **Telephone**  
Enter the company's telephone number with area code.

- **Fax**  
Enter the company's facsimile telephone number with area code.
- **E-Mail Address**  
Enter the company's main E-Mail address.
- **Web Site**  
Enter the company's home page address.
- **Number of Menu Lines**  
Enter the number of lines to use in the Menu section of the function sheet.
- **Number of Comments Lines**  
Enter the number of lines to use in the Comments section of the function sheet.
- **Set Default**  
Press this button to set the default number of Menu and Comments lines for 8 1/2" x 11" function sheets.

## Printing Options Page

- **Function Sheet Paper Size**  
Choose the size of the paper used to print the function sheet. Using 8 1/2" x 14" allows more room for the menu and comments section of the function sheet.
- **Print club information on top of function sheets**  
Check this box to simulate a letterhead.
- **Print Function Sheets with "No Menu"**  
Check this box to include function sheets with the menu type of "No Menu" when printing multiple function sheets from the Open Functions window.
- **Print Terms and Conditions on function sheets**  
Check this box to include your "Terms and Conditions" in small print at the bottom of the function sheet.

## Function Defaults Option Page

This option page is for entering default values that will be used when a new function is created. All of the fields are optional.

## Terms and Conditions Option Page

- **Terms and Conditions**  
This is a free-text entry field that can display text at the bottom of the function sheet. Use it to provide a common message at the bottom of all of the function sheets.

## E-Mail Settings Option Page

Use this page to enter values associated with sending a function sheet via E-Mail.

- **Outgoing Mail Server**  
Type the name of your E-Mail server.



This is your mail server used to send mail. It is the one provided to you by your internet service provider.

- **Reply E-Mail Address**

Type the E-Mail address that will be used when the receiver of your function sheet via E-Mail presses the “Reply” button in their E-Mail program.

- **User Name**

Type your E-Mail server user name.

- **Password**


Type your E-Mail server password.

- **Function Attachment Format**

Choose the file type for function sheets that are sent via e-mail attachments. Choose Hypertext Markup Language to allow the recipient to use their web browser to view the function sheet. Portable Document Format provides the most accurate reproduction of a printed function sheet, but requires the recipient to have the free Adobe® Acrobat® Reader™ which is available at the Adobe® web site, [www.adobe.com](http://www.adobe.com).

it, it creates a fax ready to transmit. This page allows the selection of that printer.

- **Enable Fax Printing**

Checking this box will put a **Fax**  button on the tool bar.

- **Fax Printer**

Choose the fax printer from the drop-down box.

## Fax Printing Option Page

Use this page to enter values associated with sending a function sheet via a fax printer. Using this option requires a third-party faxing program, such as Symantec’s WinFax Pro®. These third-party programs add a special printer to your printers folder. When you print to



## Multi-User Features

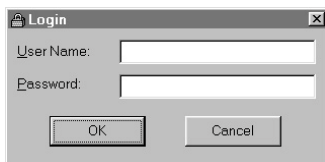
### Multi-User Option Introduction

The multi-user option applies password protection to certain features of the program to allow multiple people to access the program on a single computer. The option also allows for multiple computers networked together to run **Reservation Management System** simultaneously. **Reservation Management System** supports all of the popular Microsoft Windows® networking options.

If **Reservation Management System** will be used from multiple networked computers, it is imperative that each computer is set to use one common database. Be sure to go to the **General Options Page** of the Program Options dialog box to set the location of the database.

### Login

From the main menu, choose **File > Login...**



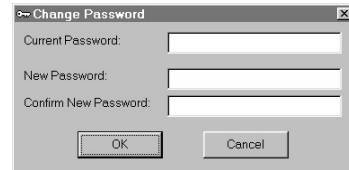
When the multi-user option is enabled, the **Login** window is used to control access to both the program and specific features of the program. Type your user name and

password, then click **OK**. Passwords are case sensitive. Based on the permissions that the administrator sets, some of the program's features may not be available to a particular user.

Note: Passwords are case sensitive

### Changing Your Password

From the main menu, choose **File > Setup > Change Password...**



When the multi-user option is enabled, the **Change Password** window is used to change the current user's password.

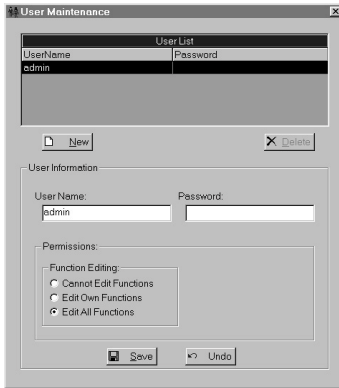
#### Changing your password:

- 1 Type your current password in the **Current Password** field.
- 2 Type your new password in the **New Password** field.
- 3 Type your new password a second time in the **Confirm New Password** field.
- 4 Click **OK** to change the password.

Note: Passwords are case sensitive


## User Maintenance

From the main menu, choose **File > Setup > User Maintenance...**





This menu option is only available to the system administrator.


### Deleting a user:

- 1 Click on the user in the user list to highlight it.
- 2 Click **Delete** .

### Adding a user:

- 1 Click **New** .
- 2 Type the user name for the new user in the **User Name** field.
- 3 Click on the permissions for the new user.
- 4 Click **Save** .

### Changing a user:

- 1 Click on the user in the user list to highlight it.
- 2 Click on the desired permissions for this user.
- 3 Click **Save** .

# TRIAL HELP

## Initialize First Time (Welcome)

Welcome to **Reservation Management System**. You are about to begin a full-featured time-limited trial of our software. There are no features disabled. Use the on-line help to explore all of the features of the software.

If you have any questions, do not hesitate to contact Catersoft or your sales representative.

Thank you for giving **Reservation Management System** the opportunity to save you time, effort, and money.

## Valid Usage (OK Cancel)

Welcome to **Reservation Management System**. You have a valid license to use the program.

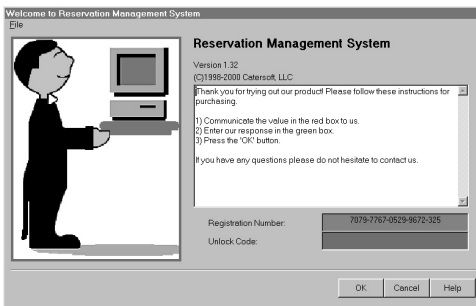


At the top of the large window, you will see the amount of time remaining on your license to use **Reservation Management System**. You can also check the amount of time remaining while in the program click **Help > About ...**.

If you have an unlock code number, click the **Register >** button to enter your unlock code number into the green box. If you have any questions, please contact Catersoft or your sales representative.

## Extension Window of Valid License

Welcome to **Reservation Management System**. Use this window to extend your license to use the software. If you do not have an unlock code, please contact Catersoft or your sales representative to find out how to obtain one.



Enter your unlock code number into the green box and then click **OK**. A window will then be shown to confirm that the number was accepted. Please contact Catersoft, if you have any questions or concerns.

## Expired

Your license to use the program has expired. Please contact Catersoft or your sales representative to acquire a license to continue using **Reservation Management System**.

## Date Set Back

Our software has detected the computer's clock being set back. If this has happened in error, please contact Catersoft for an unlock code number that will reset the software.

## Invalid Trial Database (Corrupt)

Our software has detected a problem with the registration database. This usually happens when the computer's hard disk drive has been replaced, or some important files have been deleted. Please contact Catersoft for an unlock code number that will reset the software.

# INDEX

## A

About CATERSOFT ..... 5

## B

Backup/Restore Database ..... 29

## C

Changing Your Password ..... 35

Club Information Option Page ..... 31

Compact Database ..... 29

Creating Repeating Functions ..... 21

## D

Deleting Repeating Functions ..... 21

## E

E-Mail Settings Option Page ..... 32

Entering Functions ..... 17

Entering Functions - Comments Page ..... 19

Entering Functions - Contact Page ..... 17

Entering Functions - Equipment Page ..... 18

Entering Functions - Function Page ..... 18

Entering Functions - Left Menu Page ..... 19

Entering Functions - Pricing Page ..... 18

Entering Functions - Right Menu Page ..... 19

Entering Your First Function ..... 12

Equipment Needs ..... 14

<b>F</b>	
Fax Printing Option Page .....	33
Finding Functions .....	15
Function Defaults Option Page .....	32
<b>G</b>	
General Options Page .....	31
<b>I</b>	
Installing RMS .....	9
Initial Setup .....	11
<b>L</b>	
Letter Creator .....	25
Letter Creator Introduction .....	25
Login .....	35
Look-Up Existing Functions .....	12
<b>M</b>	
Menu Creator .....	23
Menu Creator Introduction .....	23
Multi-User Option Introduction .....	35
<b>O</b>	
Opening Functions .....	13
<b>P</b>	
Printing Options Page .....	32
Printing Repeating Functions List .....	21
Program Setup Menu .....	27
<b>R</b>	
Registration Screen .....	11
RMS Features .....	7



**S**

Setup Available Equipment .....	27
Setup Bars, Tables, Head Table, Cloth Napkins.....	28
Setup Menu Items .....	23
Setup Rooms/Locations .....	28

**T**

Terms and Conditions Option Page.....	32
Trial Date Set Back .....	38
Trial Expired .....	38
Trial Extension Window of Valid License .....	38
Trial Initialize First Time (Welcome).....	37
Trial Invalid Trial Database (Corrupt) .....	38
Trial Valid Usage (OK Cancel) .....	36

**U**

User Maintenance .....	36
Utilities .....	29

**V**

View > Options .....	31
----------------------	----

**W**

Welcome .....	5
---------------	---