



P.I.M.S.[™] C/S

Professional Inventory Management System

Client/Server Version

Getting Started

Apple® Macintosh®

American English

Fourth Edition

P.I.M.S.™ GETTING STARTED



by
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and
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Special Thanks To Kim Mosier



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1987



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Since
1979



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Prolog...

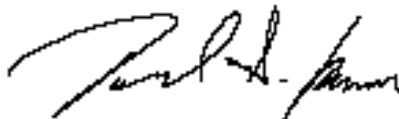
You'll find P.I.M.S.™ to be a very sophisticated and powerful program. It has been under constant development and actual use (Macintosh® Version) for over twelve years. Developed back in 1979 for the DEC Rainbow 100 System, P.I.M.S. was the first full featured inventory and sales management tool for the micro-computer industry. In 1985, P.I.M.S. was "ported" to the Macintosh from our Hewlett Packard version. In 1987, P.I.M.S. went exclusively Macintosh. As one of the original "third-party" Developers for the Macintosh, I decided to phase-out all other platforms and grow P.I.M.S. only on the Macintosh. This switch enabled P.I.M.S. to be what it is today.

Also founded in 1979 as a full service computer retail dealership and system integration group, ExecUtron Computers, Inc. (now called ExecUtron Development Corporation) was a major player in the newly developed personal computer market. As founder of one of the original third-party developers for the Macintosh platform, I brought both ExecUtron Computers and Mosier Engineering together in 1985 to produce advanced business automation products for the Macintosh arena. From this joint venture came the company's flag-ship application, P.I.M.S.

If you have a solid understanding of your business, along with being organized and hard working, I am confident you will grow your business with P.I.M.S. like so many others.

I hope you enjoy this product as much as our staff and testers have over the years!

Sincerely,



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About your manual set...

Your current P.I.M.S.™ manual set has a slightly larger page and font size than other instructional manuals. This size facilitates our electronic versions of this documentation. The electronic version is of a lower resolution, so the larger format aids in its ease of reading.

If you wish to purchase additional manual sets, contact our Sales Division at (707) 525-3728 (USA).

Also note:

This **Getting Started** manual's purpose is to aid the user in the preliminaries of P.I.M.S. usage. It instructs you on the pre-installation, as well as the installation process. Also covered is general P.I.M.S. usage. For information concerning specific P.I.M.S. operations, consult the Using P.I.M.S. manual instead.

This manual was produced with the following software:

- Quark Xpress™
- Adobe Illustrator™
- Adobe Photoshop™
- Adobe Dimensions™
- Microsoft Word™
- Claris CAD™
- Flash-It

Produced On:

- Macintosh Quadra 950, Apple 21" & 14" color monitors (loaded)
- PowerPC 8100
- PowerBook 540c (under the Redwoods)
- HP 4M Plus with duplexing unit - Proofing

Printed On:

- DocuTech System - Santa Rosa, Ca.

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P.I.M.S. was designed primarily as a sales control application for any business that purchases and/or manufactures items for resale. P.I.M.S. is very well suited to businesses that price and sell their products in various manners to various types of customers through sales representatives. These businesses require almost unlimited flexibility to manipulate pricing, availability and priority of these sales. P.I.M.S. allows this type of flexibility.

The following is a list of some of the types of businesses currently using P.I.M.S.:

- Computer Dealerships**
- Service & Repair Stations**
- The United States Government**
- Furniture Manufacturers**
- Wineries**
- Construction Accessories Manufacturers**
- Bottling Companies**
- Equipment Agents**
- Mail Order Distribution Houses**
- Pharmaceutical Manufacturing & Distribution**
- Custom Metal Fabricators**
- And Even A Champion Dog Breeder...**

With the incorporation of our EDC Integrated Accounting Module, powerful client tracking and calendar/scheduling functions, P.I.M.S. is a one stop answer to the solution of maximum productivity that has been eluding your business all this time.

STRUCTURE:

P.I.M.S. is made up of the following data sections, called **Files**:

- EDC Accounting
- Departments
- Categories (Inventory)
- Vendors
- Employees (Reps, Salespersons, etc...)
- Customers
- Inventory (Finished Goods and Components)
- Inventory Bundles
- Purchase Orders
- Work Orders
- Build Schedules
- Receiving Records
- Shipping Logs
- Bill-Of-Lading
- Orders (Quotes, Sales Orders, Invoices)
- Calendars
- Service Repair Orders
- Warranty Reimbursement Reconciliation
- Periodic Maintenance Scheduling
- Price Protection Worksheets
- RMA Worksheets
- Vendor Billing Reconciliation Worksheets
- Vehicle Records & Logs
- Job Files
- Serial Number Records
- And Over Forty More!...

This "Client/Server" version of P.I.M.S.™ is based in part on P.I.M.S. version 10.0.6, which was replaced with P.I.M.S. C/S beginning at MacWorld 1994.



Each of these files is subsequently made up of individual **records**. These records contain **Fields** where the user and P.I.M.S. basically "fill in the blanks". Figure 1-a shows this relationship in a graphic form. All of the information you enter into P.I.M.S. is stored in the **Datafile**.

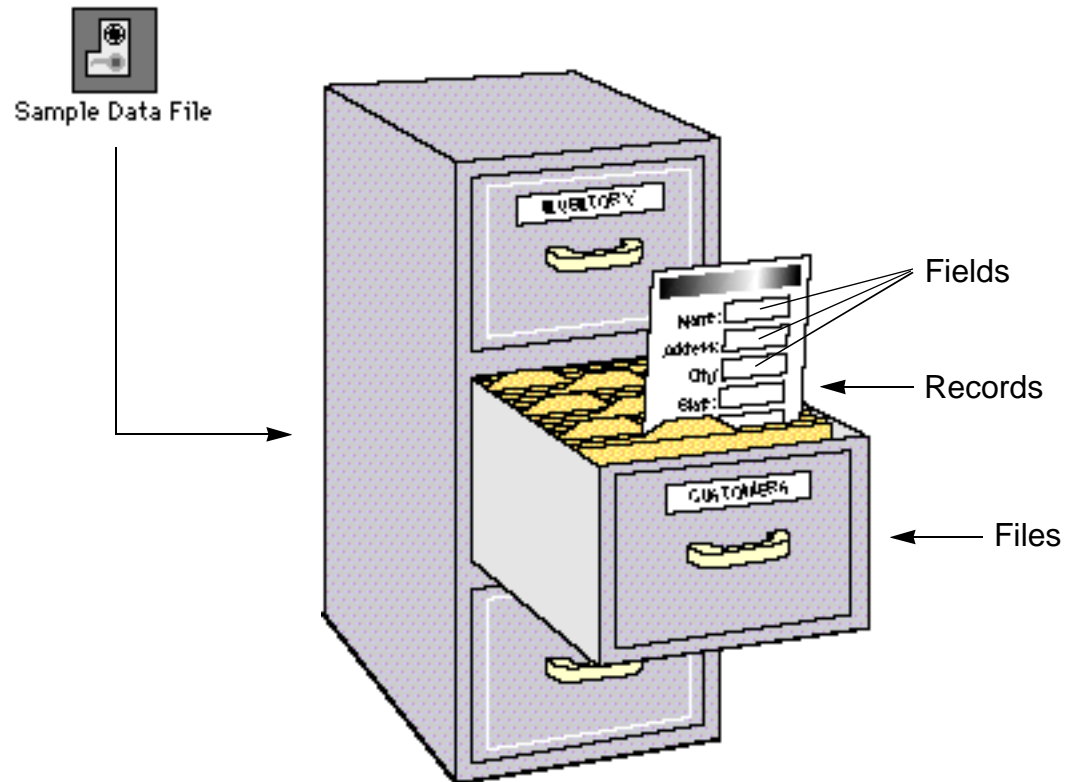


Figure 1-a

The difference between P.I.M.S. 10.x.x (the previous multi-user version) and P.I.M.S. C/S (Client/Server) is that P.I.M.S. C/S has been re-developed to operate in conjunction with EDC's Client/Server engine. This dramatically increases P.I.M.S.' capacity, performance, and efficiency over Apple's multi-user file sharing protocol. We currently have clients running P.I.M.S. C/S in a supermarket environment, generating in excess of 400 invoices per terminal per day. Their average time used to create and print an Invoice is less than 20 seconds!* This would not have been possible using standard multi-user file sharing. This type of performance and data-integrity can only be achieved in a Client/Server environment.

* Centris 650 used as Server, Quadra 610 as Terminal, EtherTalk network protocol and cabling used.

Always back-up (make a copy of) your datafile on a regular basis.

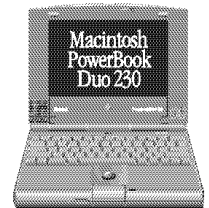
P.I.M.S.™ has automatic back-up features and functions to help save your datafile from hardware failures, and the like...



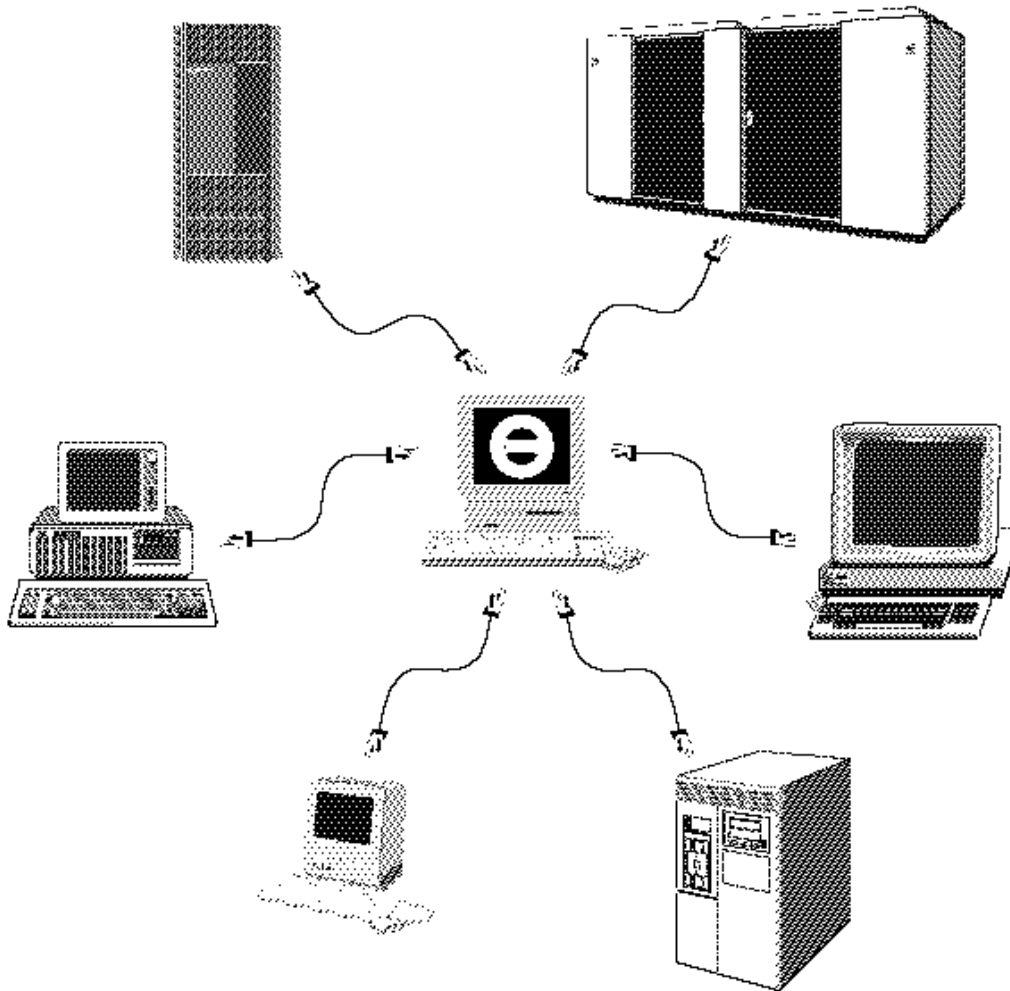
P.I.M.S. INTERACTION:

P.I.M.S. will allow a user to export information to other Macintosh as well as MS-DOS and "Main Frame" programs. This is useful for people that use P.I.M.S. as a "front-end" for large mainframe applications, or businesses who manipulate other peoples' information and then send it back to them for use on their computer system.

Another popular use of P.I.M.S. is to use the File I/O (importing and exporting of data) to transfer Customers, Orders, etc. between PowerBooks on-the-road and the "Main" system. This feature allows a Sales Rep using Apple's PowerBook portable Macintosh to go out in the field and gather new Customers/Prospects and even generate orders, and then transfer these Customers or Orders to the main P.I.M.S. program back at the office for processing. This is very popular among organizations that have Sales Reps with large territories that are often away from the office for extended periods of time.



Export/Import remote Customers, Invoices, etc...



P.I.M.S. can also be used to track other peoples' inventories. Perhaps you distribute camera and other photo supplies. Once a month you make the rounds to your existing client base and take a physical inventory of your products for them. You used to have to write down all of the items and their quantities, go back to your office, enter this information into a spreadsheet, print it out and send it back to your client. This is a lengthy process! With P.I.M.S. you would pack along your hand held portable barcode reader, "zip" all of your products, and then transfer the information directly into P.I.M.S. . –Greatly reducing hours spent counting and entering!

SECURITY:

For businesses that rely on less than trusting employees, P.I.M.S. has a couple of features to help the business protect themselves from possible un-authorized mishaps. The first feature is multi-level passwording. This allows only certain people access to certain areas and functions of P.I.M.S. This keeps employees from sensitive areas of information. The second feature is the P.I.M.S. Plug-In Delivery System. This feature automatically copies a user-definable list of control Plug-Ins (if a company uses them) to every terminal that ties into the server. This feature allows the P.I.M.S. Administrator to govern the functionality of all terminals.

FLEXIBILITY:

P.I.M.S. was written to be as flexible as possible. The user has control over the overall operation of the program. In the **Company Info** section (explained later), the user has at their disposal, many controls that set the flow of the program. Many of these controls are for such things as default order type, taxable/non-taxable operations, control over output devices, etc. P.I.M.S. is flexible enough to allow a user to tailor the program to their specific needs.

MULTIPLE LOCATION INVENTORIES:

With the addition of **P.I.M.S.™ CONNECT**, P.I.M.S. can track and maintain multiple inventories, both on and off site. Automatic uploading and downloading of information can take place at night while your businesses are closed.



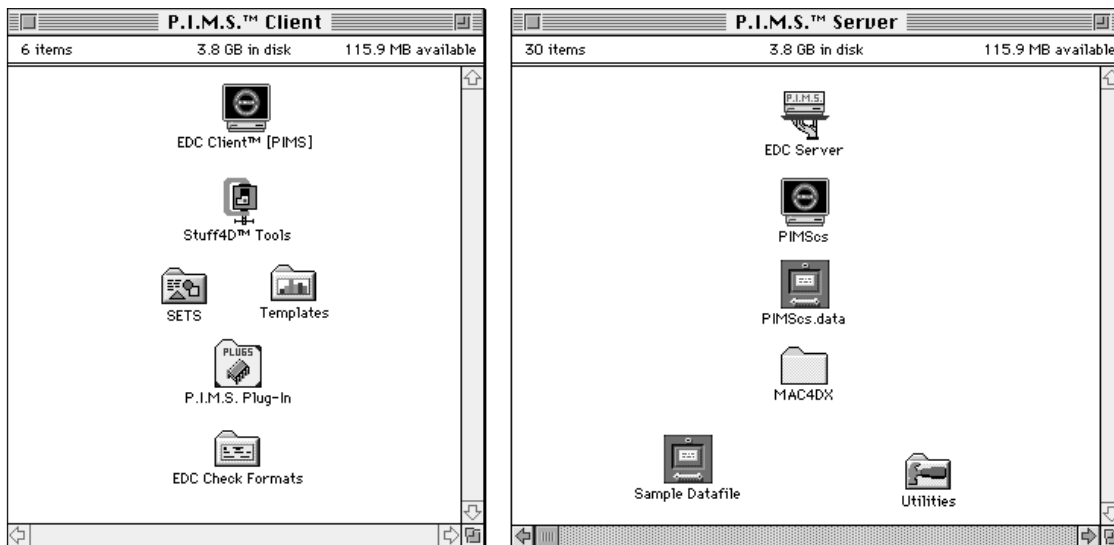
P.I.M.S. currently comes in two distinct versions:

- **Single-User** (one program, one terminal, no server)
- **Client/Server** (several terminals, server, P.I.M.S. server structure)

This manual set will concentrate on the Client/Server version of P.I.M.S. since it represents over 98% of our user base. About the only difference between the two is in the installation...

CLIENT/SERVER:

Your P.I.M.S. system will consist of a dedicated server and two or more terminals. On the server, you will have loaded the EDC Server Engine, ExecUtron's P.I.M.S. Application File (PIMScs) and datafile. On each terminal connected to the P.I.M.S. running on the server, you will have the EDC Client application and a few P.I.M.S. operation files and preferences.



- + Please note that the actual number, type, and positioning of files may vary from your installation depending on the version you are running. They will, however, look something like the above windows.



+ *How does a Client Server differ from regular multi-user ?*

In a traditional multi-user environment, one or more terminals run an application that reads and writes data to and from a datafile that is usually located on another machine. It is up to the individual terminals to decide whether or not the datafile is being accessed by another terminal and if so, what part. Only one terminal at a time can write data to that datafile. This slows down access to other terminals. Along with this, entire "Records" of information have to move as a single block of data from the datafile to the terminal, even if only a small amount of that record's information is needed.

Client Serving differs from traditional Macintosh multi-user in that the software and datafile both reside on the server machine. On that machine, the server application (P.I.M.S.) is running and directly tied into the datafile. It waits for the terminals, running Client applications, to request a task to be performed or information to be sent. Because only one program is accessing the datafile, the management or "trafficking" of information is far more efficient and reliable. The server application itself is responsible for which terminal gets what information. It does this by receiving requests for information from the terminals. Each request gets equal consideration.

P.I.M.S. And Client Serving:

ExecUtron uses the EDC client server engine. We have found that our engine is by far the most efficient and reliable client serving architecture available for the Macintosh platform. It coincides with P.I.M.S.' internal structure and philosophy of keeping up with a fast moving and quickly changing computer market. Because it matches our commitment to insuring that P.I.M.S. will run on all newly introduced Macintoshes, we are fully assured that our customer base will be well maintained from now into the extended future.



P.I.M.S. is a very powerful and comprehensive program. It brings "mainframe" abilities to the micro-computer arena with a user-friendly attitude. For us to make P.I.M.S. compatible with Apple's Macintosh computer platform, we had to place a higher level of requirements on the Macintoshes running it.

The following is a brief description of the minimum requirements for running a P.I.M.S. system. The following categories of equipment will be covered:

- Server
- Terminals
- Output Devices (printers, cash drawers, etc.)
- Input Devices (barcode readers, keyboards, etc.)
- Network Topography

+ You should always contact ExecUtron, or your Dealer, for the latest information on compatible equipment and services.

SERVER:

The equipment requirement for the Macintosh acting as a server is the most stringent. Our minimum requirements are:

- PowerMac CPU
- 40 MB of RAM (allocated to the EDC Server application)
- 500 MB Harddrive (P.I.M.S. requires 35 MB for installation)
- 12" Monitor (any configuration)
- Mac O/S 7.5.1 (7.5.5 recommended) with the following:
Open Transport 1.1.1 (1.1.2 or greater recommended)

The recommended Macintosh for a server machine as of this writing is a PowerMac 9600/200 MHz, 96+ MB RAM, and 1 GB+ harddrive.

+ The minimum RAM requirement of 40 MB (allocated to the EDC Server application) will adequately serve up to five users. We recommend adding another 2MB of RAM for each additional terminal after that.

+ AppleShare™, Work Group Servers, etc.:

Because the EDC server engine does not require any standard form of file sharing, AppleShare and the Apple Work Group servers are not needed to communicate from server to terminal and vice versa. As a

It is strongly recommended that any "AV" configured Macintoshes such as the 840AV and 660AV be avoided at all times. They make very unreliable servers and terminals...

If allocating memory to EDC Server, please keep in mind that the Operating System occasionally grabs more RAM when it needs it...



matter-of-fact, AppleShare (and file sharing in general) slows the server down by as much as 40%!

For a safe and reliable server, the EDC server software should be the only application running on the server machine.

TERMINALS:

The equipment used as a terminal does not have as strict a requirement. This is because most of the processing takes place on the server. The speed of the terminal will, however, dictate the speed in which information is sent and received, how fast screens refresh, and program launch speed.

For terminals, P.I.M.S.' minimum requirements are:

- **68040 CPU:** 9 MB RAM (Allocated to EDC Client application)
- **PowerMac CPU:** 11 MB RAM (Allocated to EDC Client application)
- **40 MB Harddrive** (P.I.M.S. requires 5 MB for installation)
- **13" 256 Color/Grayscale Monitor, Or Larger**
- **Mac O/S 7.5.1 (7.5.5 recommended) with the following:**
Open Transport 1.1.1 (1.1.2 or greater recommended)

The recommended machine to use as a terminal, as of this writing, is a PowerMac 8500 or an equivalent model. We recommend allocating 12 MB RAM to the EDC Client application on a 68040 CPU and 16 MB RAM on a PowerMac CPU.

OUTPUT DEVICES:

Reporting:

One of P.I.M.S.' greatest attributes is its output. Because of P.I.M.S.' many specialty reports and features, a printer with 1% incremental reduction is highly recommended. The recommended output device for reporting purposes is an Apple or Hewlett-Packard laser printer.

Invoicing:

There are many options for the printing of Invoices. They range from LaserWriters, to ImageWriters, to receipt printers. For the Apple ImageWriter II, you have the choice of using Apple's relatively slow print driver or our high-speed serial printing which prints upwards of 230 characters per second with virtually no initial delay!

You should contact ExecUtron Development, or your local P.I.M.S. dealer, for the current selection of Invoice options and compatible

It is strongly recommended that any "AV" configured Macintoshes such as the 840AV and 660AV be avoided at all times. They make very unreliable servers and terminals...



templates and printers.

Cash Drawers:

P.I.M.S. also has the capability of automatically opening certain electronic cash drawers. Contact ExecUtron Development, or your local P.I.M.S. dealer, for current compatible models.

INPUT DEVICES:

P.I.M.S. is compatible with all brand name ADB input devices. This includes keyboards, touch-screens, track balls, barcode readers, etc. P.I.M.S. currently does not utilize extended keyboard function keys. This negates the need to purchase an extended keyboard.

NETWORKING:

If you are ever going to have problems with a Client/Server system like P.I.M.S., it's probably going to be due to your network. There are many people and organizations out there that profess to being network specialists. Be careful! Make sure that who ever is setting up your network knows what they are doing.

P.I.M.S. is compatible with all known forms of network topographies currently available for the Macintosh platform. The two most popular are LocalTalk and EtherNet. The main differences between the two are as follows:

LocalTalk This protocol is Macintosh specific for the most part, and was introduced many years ago with Apple's first LaserWriter and it uses wiring similar to standard phone cable. It is relatively easy to install. It can (on a clear day) transfer data at the theoretical rate of 230K BAUD. Its drawbacks are that components used to connect this type of network are usually of a lesser quality than EtherNet, and it is prone to electrical interference. It is, however, less expensive than EtherNet. All Macintoshes capable of running P.I.M.S. have LocalTalk built in to them.

EtherNet EtherNet is a commercial standard for serious networks for small to medium sized businesses. It has a data transfer speed of up to a theoretical limit of 5000K BAUD. It requires special cabling and connectors, along with the occasional transceiver. The cabling and components for this type of network are generally of a higher quality due to the



increased transmission rate. This comes at a premium though. The average EtherNet installation costs twice as much or more than a similar LocalTalk network. The real downside of an EtherNet network is the connecting of non-EtherNet printers. To connect these printers to an EtherNet network, you need either a "Router" or an EtherNet to LocalTalk adapter. EtherNet should also be professionally installed by a licensed expert.

The overall advantage of EtherNet over LocalTalk is increased speed and data-integrity (due to proper shielding).

- + We strongly recommend EtherNet over LocalTalk for the reasons stated above.**

NOTE:

EtherNet or some form of FDDI device protocol should be used as a network. ADSP, TCP/IP, and IPX are the communication protocols available. ADSP is the default and is suggested. LocalTalk connections work very well through standard Routers, as do ARA connections to the Server. If an ARA connection is desired, make sure that the ".rex & .res" files are already copied to that terminal prior to connection. If not, it might take up to an hour to transfer these files over the modem. If Routers are used in your network and a Router develops a problem (for what ever reason), all terminals connected to the Server must be brought down and the Server must be restarted (Shutdown or Restart). Also, if you have difficulties with LocalTalk connections, you will find that the problem lies with your Router(s).

OTHER DEVICES:

Modems:

To date, P.I.M.S. C/S can be accessed over a modem at a minimum rate of 28.8K BAUD. To accomplish this, the remote site and the network your server is residing in must use 4D Remote™ and a 28.8KB modem (or better). The remote Client application would rely on 4D Remote™ to establish a network connection with the Server's network. Once established, connection would take place as usual. The only difference is that you would be connecting at about 21K BAUD as opposed to 230K or 5000K. It's not very fast, but you can get the job done if necessary!



Memory:

When we say that P.I.M.S. requires a minimum of 40MB of RAM for the Server application and 11MB of RAM (or 9MB for a 68040 CPU) for the Client software —We mean it.

We describe RAM as Random Access Memory; a series of chips on a plug-in module called a SIMM or DIMM. We do not consider Virtual memory or programs such as RAMdoubler™ to be RAM. This pseudo-RAM is more trouble than it's worth. Having either of these options initiated (or anything similar), you will slowly watch your operating system eroded to a point where it is unusable; along for the ride is P.I.M.S. You will slowly see your datafile corrupt and eventually die. The only exception is turning on virtual memory on a PowerPC Macintosh, and setting it to its lowest setting (generally 1 MB more than the physical RAM). This actually increases that amount of physical RAM available to P.I.M.S. without the usual virtual memory problems. This should be done on an 8MB PowerPC only.

It is also important never to adjust the amount of RAM allocated to EDC Server below the suggested amount. This will compromise data integrity.

+ There is no substitute for installed RAM.



Toys, Junk, Etc.:

In the Macintosh world, it is common for users to load their machines with lots of goodies called INITs, CDEVs, etc. These are little programs that are loaded while your operating system is initializing. These programs can add sounds to your Macintosh, change its appearance, or add accessories like clocks, timers, etc. Each one of these programs takes memory and processor time. Sometimes, they're at the wrong place at the wrong time. When this happens, things stop working. We therefore strongly advise against the use of these unnecessary items.

P.I.M.S. is unlike any other program you have ever run. It is a large program and it processes many megabytes of information a day. When installed into an environment that is free of obstacles, P.I.M.S. will function without "System Bombs" or any other unpleasanties. It has been tried and tested, in one form or another, for over a decade.



PREPARING TO INSTALL:

The installation process is performed by a series of diskettes called an "Installer". There are two sets of installers for P.I.M.S. C/S: one for the Server software and another for the Client software. The number of diskettes in the Client installer is no less than two and the Server has no less than seven, but there might be more, depending on the version you are installing.

INSTALLATION: (SERVER)

Step 1:

Make sure the machine that is to act as the Server is set-up to factory specs with the proper versions of operating system, network protocol, and is free from all unnecessary INITs, CDEVs, etc. Now insert **Disk 1** of the installer set. When mounted, double-click on the application that resides on it. It will look similar to, if not exactly like, this:

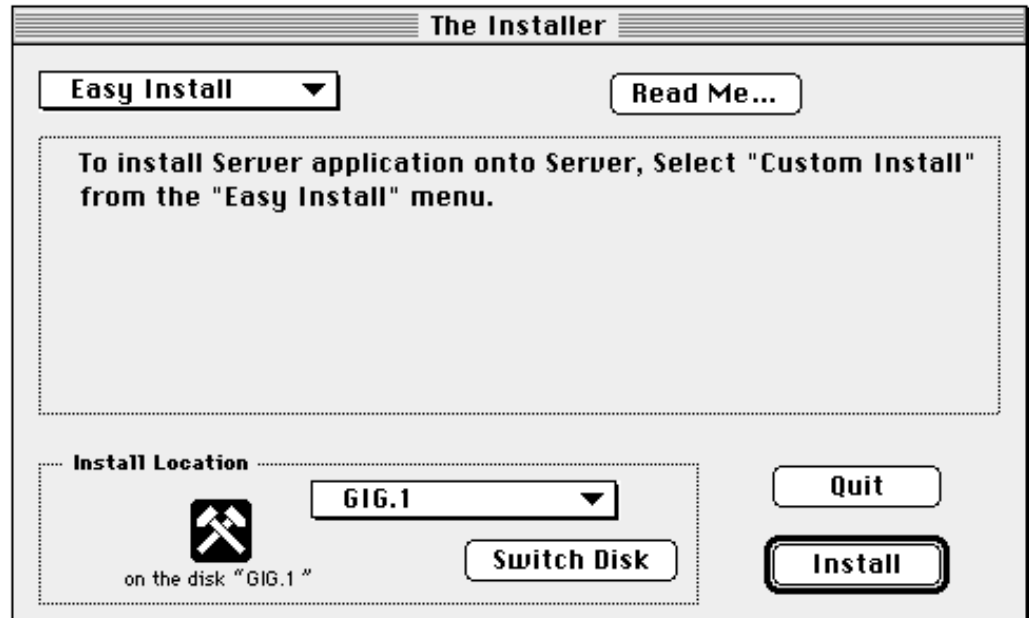


Step 2:

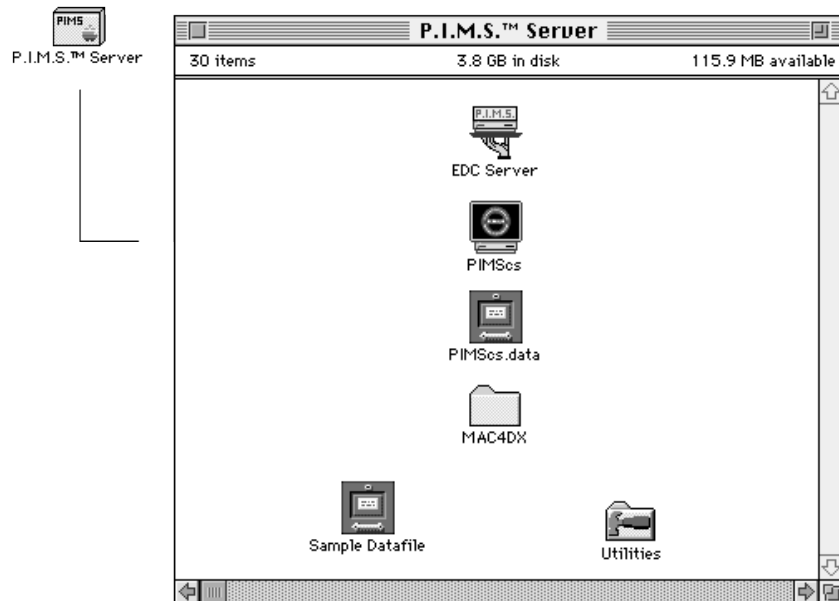
The next thing you see should be a "splash" screen, which is nothing more than a greeting. After clicking OK, you will be presented with a "READ ME" dialog, if one has been provided for you. If you are presented with such a dialog, you will be given the choices of reading it, saving it, and/or printing it. You should always at least read what this installer has to say. If there is something to read, then its purpose is to tell the user of things that might differ from the current edition of the documentation. This might be information concerning installing P.I.M.S. onto a newly introduced Macintosh, performing an upgrade from one P.I.M.S. version to another, or vital information concerning changes or additions to the program. No matter the reason, all **READ-ME** files should be read right away.



Once read, you can click **Continue**. You will now see the installation control dialog:



Select the appropriate volume (hard drive) and click **Install**. The installer might ask you to insert other installer diskettes during the process. Once the installation is complete, the following folder and its contents (or something similar) should be on your harddrive:



EDC Server is the server application. It is the program that will be running on the server machine.

PIMScs is the P.I.M.S. binary structure file that has been converted to be used by the EDC server. The Server software will load this P.I.M.S. file and distribute its resources to the outlying terminals. It is also used as a map to instruct the Server how to operate and maintain P.I.M.S.' datafile. It is a good idea to make an Alias of the PIMScs file and place it into the Startup Items folder found in the System Folder. This will allow the operating system to launch the Server application and load P.I.M.S. every time the computer is started.

+ **Never change the name of "PIMScs". Its name should remain intact.**

PIMScs.data is the datafile where all of the information you and P.I.M.S. create is stored. You may call it anything you like, but the reason why the default name is the same name as the P.I.M.S. structure file with the suffix ".data" added to it is so P.I.M.S. will load it automatically. P.I.M.S. will prompt you for a datafile if the PIMScs.data datafile is not present. It will prompt you only once, then remember from that point on.

MAC4DX folder is a folder that contains the external code that P.I.M.S. requires in order to operate.

Utilities folder is a folder that contains the 4D Tools program and can contain files that are used for various things. You may never need to use any of these utilities, and should refer to any and all manuals that accompanied the software before attempting to use them.

The server is now considered ready.

☞ **You should not have Sharing "ON" as denoted in your Sharing Setup Control Panel as it is unnecessary and will slow things down tremendously.**

NOTE:

An AWS 95 can be used as a Server machine, but it must have all of the necessary "fixes" applied and must be running A/UX version 3.0.2 (fixed). This would probably be a waste of money, however, due to the fact that the Server software would not utilize AppleShare Pro.



NOTE:

PCI Macintosh users (7200, 7500, 7600, 8500, 9500...):
Some of the lower-end PCI based Macintoshes have inherent defects from the factory. They should have a low-level format applied to their hard drive, a fresh Mac O/S 7.5.5. The Open-Transport version should be no less than v1.1.1. If connection problems with the EDC Server occur, try using either IPX or TCP protocol as a connection method. If problems still occur, have the machine(s) serviced by an authorized service center.

NOTE:

Older Mac 7200 or 6200 users:
The older Macintosh 7200 and 6200 CPUs have network and operating system problems as part of their design. They usually are not reliable EDC Client terminals, and should be avoided...

NOTE:

A folder named "P.I.M.S. Incompatible Files" will be created during each installation. Hopefully, this folder will remain empty after the installation is complete. If not, it will contain files that are not recommended for use while P.I.M.S. or EDC applications are running. You may choose to put the files back where they came from, but ExecUtron Development Corporation can not guaranty P.I.M.S.' performance, stability, or datafile integrity if they are running. If the folder remains empty, you may simply discard it.

NOTE:

Virus Protection Software:
Programs such as "SAM Anti-Virus" software are not as "Installer Aware" as they claim, and should be turned off temporarily when running this installer.

NOTE:

Apple Computer's "Energy Saver" Control Panel:
This Control Panel can cause severe problems with the EDC Server application. This will happen when the Macintosh "goes to sleep". At this point, connections are lost! The Energy Save Control Panel must be opened and set to "Never". IT MUST NOT BE DISABLED OR REMOVED. Doing so will negate the "Never" setting. This also holds true for most "Screen-Saver" applications. The best way to save power and your screen is to simply turn your screen off...



ATTENTION CURRENT ACI USERS:

Effective November 1996, any new EDC products or upgrades (including P.I.M.S.) will no longer support the ACI Client/Server architecture. Instead, these products will be compatible with the new EDC Client/Server from ExecUtron Development Corporation.

This product is functionally the same as the ACI product, with several internal modifications. It is based on a special version of ACI's Client/Server, specifically licensed to EDC. P.I.M.S. "cs" version 4.1 or greater will require the new EDC Server to operate.

Unlike previous versions of the P.I.M.S. System that utilized the ACI Server, there no longer is a need to enter license information into your Server application. For those of you who are upgrading from ACI to EDC Server, your Server "Dongle" key and ACI Expansion Packs are no longer required.

EDC Server Usage:

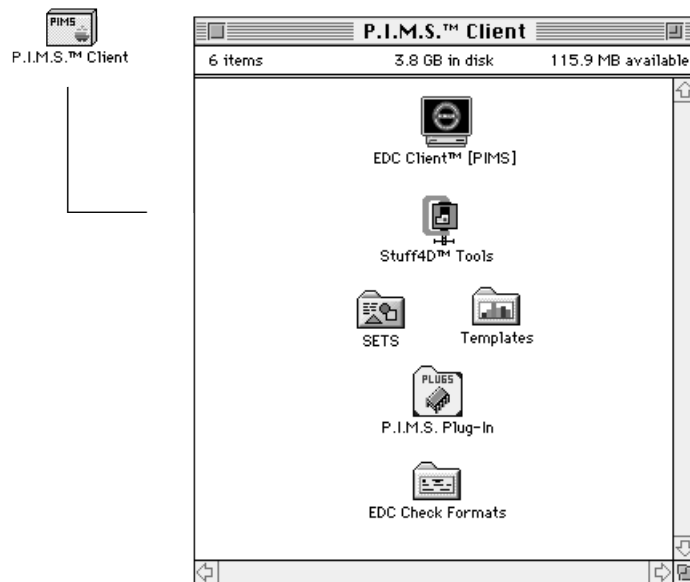
The EDC Server is offered under a "No-Hassle" license agreement. This limits the use of each EDC Server to a single machine acting as a P.I.M.S. server for a single datafile. For example: A single business entity operating at three different locations, each location having its own datafile, would require the purchase of three individual EDC Servers. A single business entity operating at three different locations, each sharing a single datafile over digital phone lines, would require only one EDC Server. More than one business, owned by the same entity and housed at the same location, would require an EDC Server for each business that would need its own dedicated server on different machines. If all of these businesses have their own datafiles that will share a single EDC Server running on only one machine, only one EDC Server need be purchased. Please refer to the EDC Server License Agreement for more information.



INSTALLATION: (CLIENT and SINGLE-USER)

As with the Server, please make sure that the machines that will be used as terminals are set to factory standards and are free from anomalies.

Insert the installation **Disk 1** into your first terminal. Double-click on the Installer icon but this time simply select your volume and click the Install button. The Installer should install something similar to the following:



Stuff4D™ Tools is a utility file used by P.I.M.S. whenever it needs to compress something. It is very important that this file remain at the same root level as the Client Application.

Single-User

To install the Single-User software on a terminal, insert the installer diskette into the terminal machine. Now double-click on the Installer icon. Once installed, launch PIMSSu. The PIMSSu.data datafile will be opened automatically. This datafile is blank and is ready for you to begin entering records. If you already have data entered into a P.I.M.S. datafile, simply remove the PIMSSu.data and replace it with your datafile. When launching PIMSSu you will be prompted to select a datafile to open.

The Client and Single-User software should be used on Macintoshes with a clean Mac O/S, and should be the only application running at that time. Deviation from this could produce unexpected results...


When entering the password upon startup, holding down the OPTION key while clicking the OK button will prompt you for a datafile...



Installing The ExecULock™:

There is one last step to the installation of P.I.M.S. onto a terminal. This does not apply to a demo version of P.I.M.S. If you are running a demo, you may skip this section.

To properly use P.I.M.S. in its full capacity mode, the user must install the ExecULock™ security device that shipped with P.I.M.S. To help keep our price low, and allow users of P.I.M.S. to make as many back-ups as they feel necessary, we have included the ExecULock™ device. This small ADB (Apple DeskTop Bus) device simply installs between your keyboard cable and your keyboard. Unlike other "Lock-outs", the ExecULock™ does not interfere with your SCSI or other communication ports. P.I.M.S. looks for this device throughout its operation. If found, P.I.M.S. runs normally. If not found, P.I.M.S. will run in a "demo" mode. When in demo mode, P.I.M.S. allows only 75 records per file to be created. This means only 75 inventory items, invoices, etc.

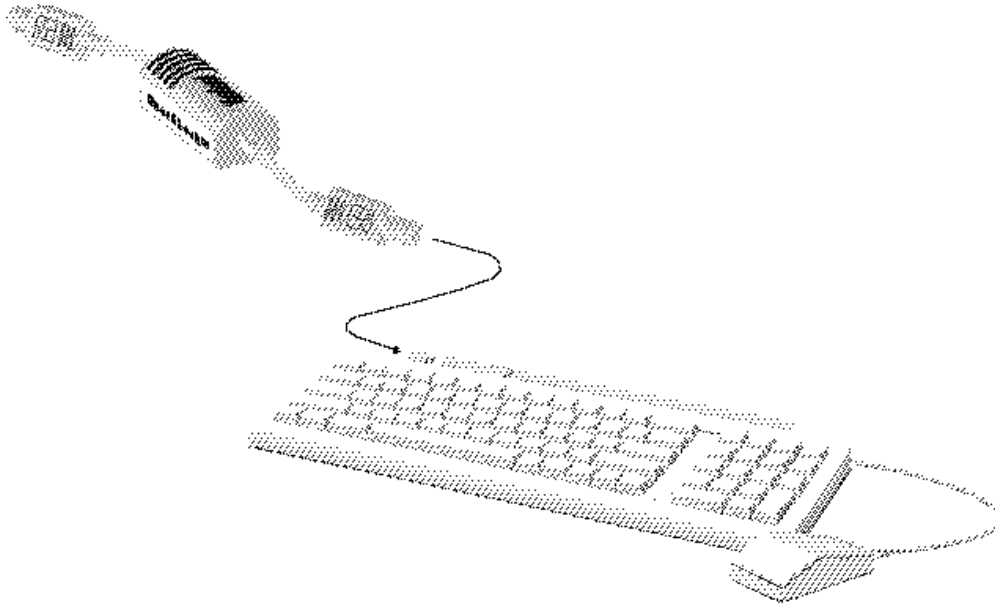
 **NOTE: No ExecULock™ needs to be installed on the Server Machine.**

If you have purchased more than one terminal, you will receive two types of ExecULocks. One will have an "M" imprinted on it, and all of the others will have an "N" imprinted. "M" stands for "Main". This is to be placed on the main (or control) terminal. This is usually the terminal that the Administrator will be using. The "N" stands for "nth" terminal. It is connected to all regular user terminals. The difference between the two is the number of functions allowable by the "M" key vs. the "N" key. P.I.M.S. running under both of these keys are, to the general user, identical. The main differences are that the "N" key does not allow a new datafile to be created by that terminal, and the Company Info section (described later) is limited. This keeps a terminal from being used as a "stand-alone" product, which helps us keep our additional terminal price as low as possible.

The following page contains an illustration that depicts an average installation of the ExecULock™.

As long as the Terminal machine has network access to the server, the terminal is considered ready for use. Remember, file sharing does not need to be activated for this connection to take place and will actually slow the server down.





•• Installation Of ExecULock™ ••

The ExecULock™ is very easy to install. Simply Follow these guidelines:

- ① **Make sure Macintosh is turned OFF.**
- ② **Unplug keyboard cable from Keyboard.**
- ③ **Plug ExecULock™ device into keyboard.**
- ④ **Plug keyboard cable into ExecULock™.**
- ⑤ **Turn Macintosh back on.**
- ⑥ **Test keyboard, mouse, and any other ADB devices.**

If necessary, you may attach the ExecULock™ device in a different manner to your Macintosh's ADB port(s). If you do pick an alternate method, be sure and test all devices for proper operation, including the ExecULock™.

P.I.M.S. adheres to Apple Computer, Inc.'s strict guidelines for program operation. This insures that all portions of P.I.M.S. looks and acts in a consistent manner.

We assume that you have already mastered the basic fundamentals of Macintosh operation before using this program. It is not the scope of this document to train you, the user, to become a Macintosh "power-user"! But just so we agree to the same terminology, we've provided a short synopsis of Macintosh basics.

MACINTOSH FUNDAMENTALS:

The Macintosh computer is a very advanced, graphically driven machine. It employs the latest in friendly human interface. This interface consists of the following parts:

- **Menus**
- **Windows**
- **Buttons**
- **Fields**
- **Cursors**

Never use the **RETURN** key to move from one field to another. Always use the **TAB** key or mouse...

Once again, we assume you are familiar with these items, but here are some general pointers:

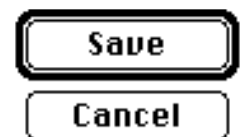
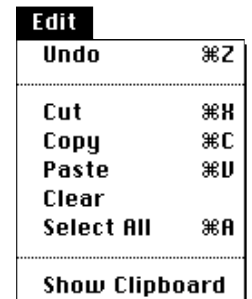
- 1) If you see a button with a dark ring around it (like our Save button), pressing the "Enter" key is the equivalent of clicking on it.
- 2) To move from one field to another, you may:
 - Click on that field.
 - Press the "Tab" key to move to that field.

DO NOT get in the habit of pressing the "Return" key to move from field to field. This will produce other actions in certain fields. When easier to use a key instead of a mouse, use the "Tab" key.

OTHER TERMS

To "Boot" P.I.M.S. is to run it.

To "Log-in" is to select your name and enter your password at start-up.



The following is a description of the basic fundamentals and operating controls of P.I.M.S.:

CONTROLS:

The Macintosh computer from Apple Computer, Inc. employs the latest state-of-the-art human interface and controls. As stated earlier, these items consist of:

- **Menus**
- **Windows**
- **Buttons**
- **Fields**
- **Cursors**

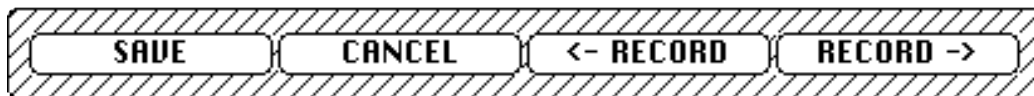
Once again, we assume you understand these items and how they interact and function. If not, refer to your Macintosh owners manual or Basic Fundamentals tutorial. This is very important.

STRUCTURE:

P.I.M.S., in its simplest terms, is made up of a series of Entry Screens, Output Listings, Dialog Boxes/Alerts, and Reports. Most of these functions are accessed through the Menu Bars at the top of the screens.

Entry Screens:

Entry screens are used to enter, view, or modify records. They generally have the following buttons towards the bottom of the screen that control the status of the record:



SAVE

Save will save the new or modified record to the datafile. Sometimes a record has fields that are mandatory. If so, P.I.M.S. will check to see if these fields are filled-in. If not, the user is notified and the save is postponed until the fields are completed. After a record is saved, P.I.M.S. might bring-up a fresh record for you to enter data into, or return the user back to where they came from.



Any text that is colored **RED** also doubles as a button...

On a record listing, buttons preceded by a bullet "•" require that certain records from the listing be selected first...

To select all records from a listing, choose "Select All" from the Edit menu...

CANCEL Cancel will not save the record, and returns the user back to where they came from in the program. Cancel never deletes a previously entered record, it just doesn't save your changes.

<- RECORD This button will move the user to a previous record. This movement only takes place if the record has been accessed from a record listing.
Please Note: when this button is clicked, the current record is NOT saved to the datafile and any modifications will be lost.

RECORD -> This is the same as the "<- RECORD" button except that the user is advanced to the next record. Both of these buttons are "grayed" when they have reached the end of the record listing.

PRINT Some record entry screens have a print button. This will save the current record and print its full-page output layout.



If you see a small ICON of a telephone, clicking it will send dialing tones to your terminal's speaker. If you have a phone dialer connected to that terminal, P.I.M.S. will dial the phone for you.

Record Listings:

Record listings consist of a scrollable area that contains a specific group of records. These records are generally gathered by selecting a particular menu item from the menu bar. From these listings, records can generally be modified, deleted, printed, etc. The bottom of the listing screen will generally have at least the following buttons:



DONE This will cancel the listing and return the user to the area where the listing was accessed from. This is usually the "Idle" screen.

PRINT LIST Print List will print the current listing, in the format presented to you on the screen, to the printer designated as your Report printer. (Auto-Choosing discussed later)



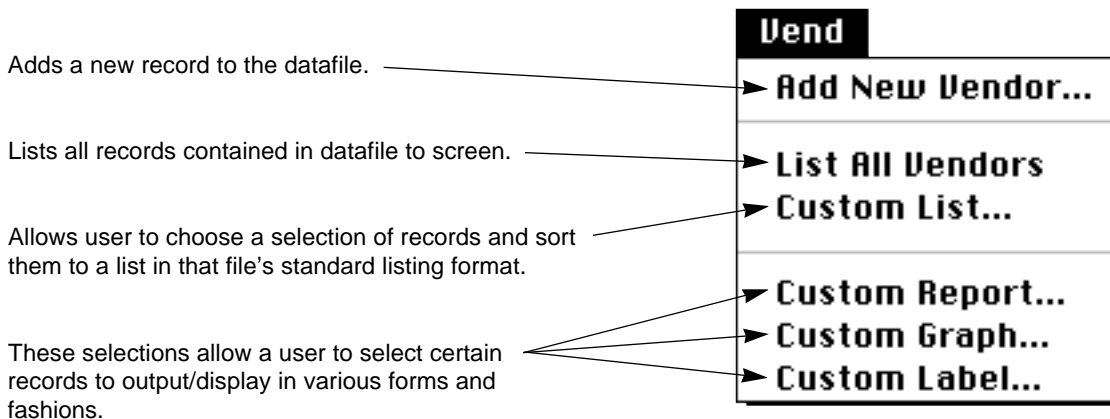
DELETE SEL. The Delete Selected button will delete any selected record(s). This deletion is permanent and can not be undone. The user will be warned ahead of time to validate this removal of records. Record deletion from a listing is controlled by the Password section of P.I.M.S. Only users with record deletion privileges can delete records from here.

PRINT SEL. The Print Selected button will print the standard output layout for the selected record(s) to the printer designated as the Report printer.

Most listings contain more than the buttons discussed here. For more information on those buttons, consult that portion of the **Using P.I.M.S. Manual**.

ADDING, DISPLAYING, and MODIFYING RECORDS:

P.I.M.S. is driven by a multitude of menus. The following is an example of a typical menu for a specific file:



Add New [file]...

Upon selecting this menu item, an entry screen for that specific file will be displayed on the screen. It will usually be empty, except for the occasional automatic numbering or code assignment. It will consist of several fields that are ready for user input. The order in which information is entered into these fields is generally not an issue.

Navigation through the fields can be performed by pressing the **TAB** key or by using the mouse. Once again, you should not use the **RETURN** key to move from one field to another. Some entry screens consist of more than one page. These pages are called **Sections**. If there is more than one page, there will be a **Sections** menu in the menu bar. Selecting the left and right arrow keys usually moves from section to section also.

List All [file]...

This menu item will list all records for that File currently stored in the datafile. This listing is presented in that File's normal listing layout. If other terminals have newly created records on their screens that have not been saved yet, they will not be part of your listing. Even if they save them, they will not be added to your listing until you re-select this menu item. This menu item should really not be used that often. The listing is not sorted in any way, and the records are not always in the same order they were entered. Custom listing is by far a better way to select a listing.

Custom List...

Custom List will allow the user to select a certain group of records that fit a certain user defined criteria. Once a selection is made, the user may sort this selection to taste. This is by far the most accurate and efficient way to pull a listing of records.

Once a listing of records is displayed on the screen, the user may simply double-click a line on the listing to view or modify that record from the same entry screen it was entered from.

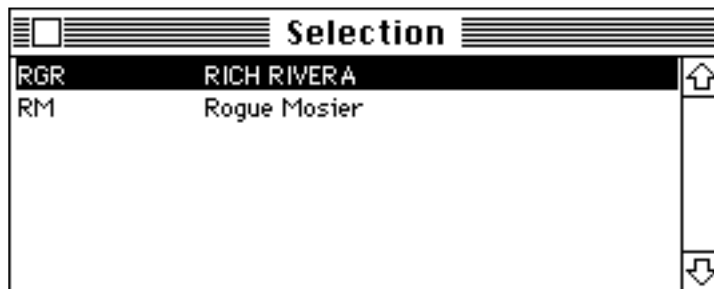
FL	FARALLON
FWB	FWB INCORPORATED
GDT	GDT SOFTWARES INC
<input type="button" value="DONE"/> <input type="button" value="PRINT LIST"/> <input type="button" value="DELETE S"/>	

Double-click a line item to view/modify its record through its entry screen. After visiting the record and either Saving or Canceling it, the user will be returned to this listing.



CLAIRVOYANT DATA SELECTION:

There are many places throughout P.I.M.S. where fields exist that are "linked" to other parts (Files) of the program. These fields are usually titled "Code..." or "Description...", etc. P.I.M.S. uses these fields to ask the user to enter text that will cause P.I.M.S. to find matching data in another File, and load that information if found. An example would be the salesperson's code on the customer entry screen, an invoice line item, etc. Usually, the user can type the first few characters of the desired information and P.I.M.S. will load the rest. If P.I.M.S. finds more than one item that starts with the same characters, a "pop-up" window will display for you to choose the correct entry. An example might be the customer's code on an invoice. Let's say we type an "R" in the code field. P.I.M.S. sees that there are two customers with codes that start with "R" and displays the following pop-up:



The user may now simply click on a line item from the pop-window to make a selection (single-click, not double-click). The user may also use the up and down arrow keys to navigate through the listing and then press the **RETURN** key to select a line.

SUBLISTINGS:

A "sublisting" is an area on an entry screen where the user can enter an unlimited number of line items. Such areas would be invoice line items, inventory alternative vendors, alternative customer shipping locations, etc. These sublistings may be activated by clicking the mouse on that area of the screen. After doing this, the user should notice that a button called **New Line**, or **Add...**, etc. becomes active (usually located at the bottom of the listing). By clicking this button, the user adds a new blank line to enter data onto. If this button is "grayed" out, or turned off, then the user must select the sublisting as stated above. Upon doing this, the button should activate (turn black). Most of the time, the user need not select a sublisting because it is the default of P.I.M.S. to select this sublisting for you when you first view a screen with

Pressing the **ENTER** key is a faster and more efficient way of entering a new line item to a sublisting. This replaces the need to click a button with the mouse...



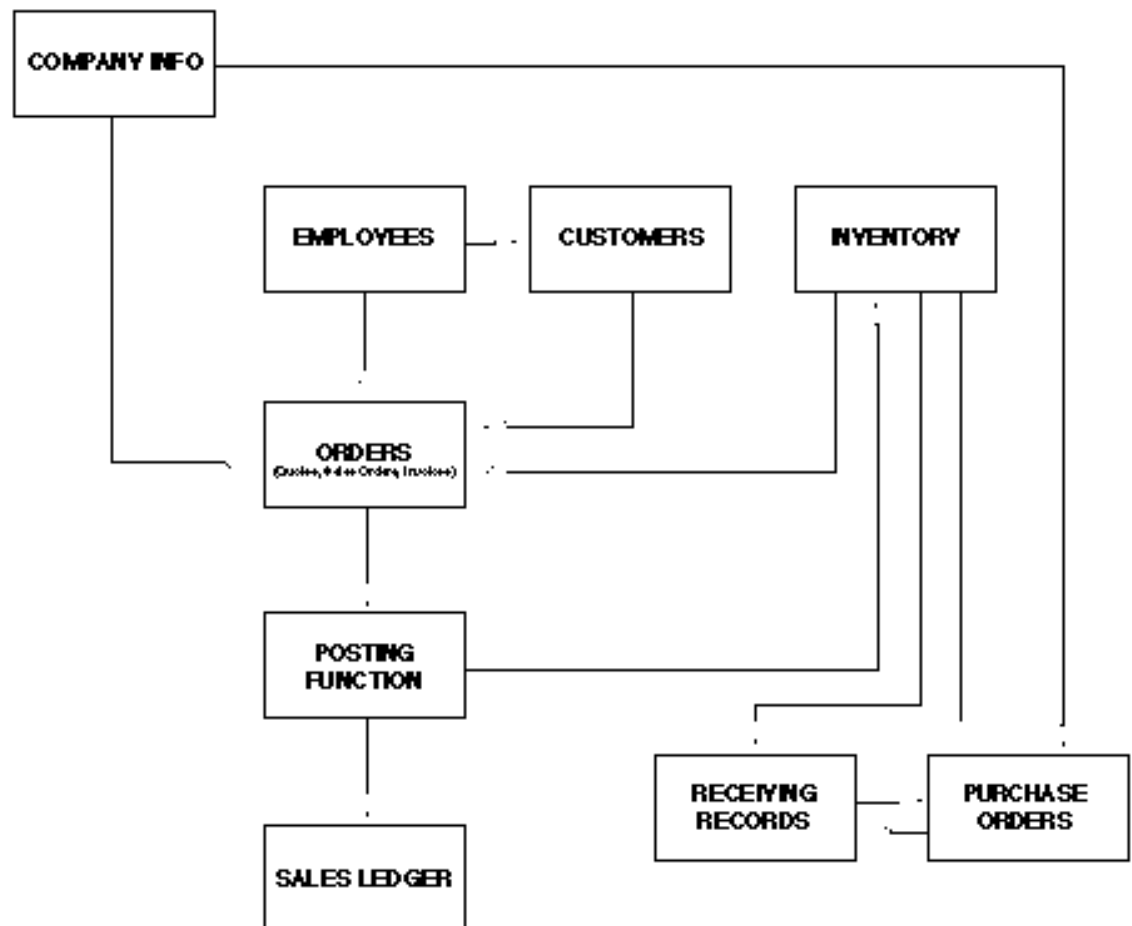
a sublisting. You only need to select it if the "Add..." button is grayed.

To delete an item from a sublisting, the user usually clicks the mouse into a field of that line and clicks the "Delete..." button. If properly selected, this Delete button will be active. If not, it will be grayed.

More detailed and specific information concerning the entry and manipulation of records can be found in the **Using P.I.M.S.** manual.

FILE RELATIONSHIPS:

The following is a map that shows the relationship of some of P.I.M.S.' more prominent Files:



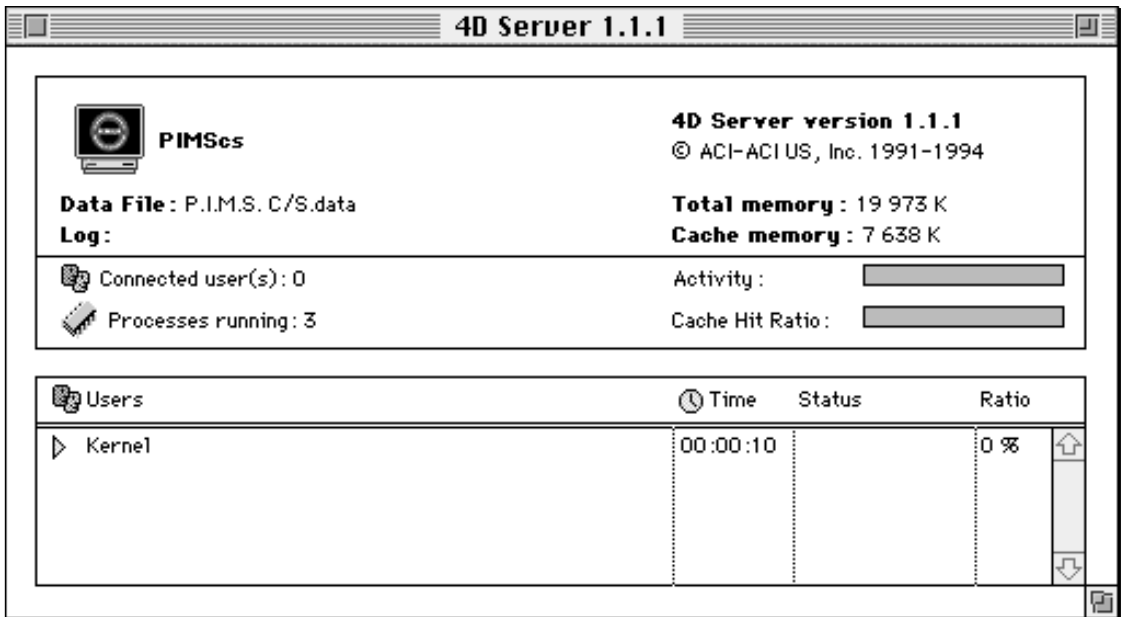
As you can see, there are many Files that share information between themselves. P.I.M.S.' clairvoyant abilities allow for quick and easy data selection. This negates the need to memorize "Codes" for the purpose of entering information.



LAUNCHING P.I.M.S.:

On Server:

To start up the server application and make P.I.M.S. available to all terminals, simply double-click on the PIMScs ICON that resides on the Server. MAKE SURE YOU ONLY HAVE ONE COPY OF THE SERVER APPLICATION ON YOUR SERVER MACHINE. After a brief start up period, your server will be ready for terminal access, as shown below:

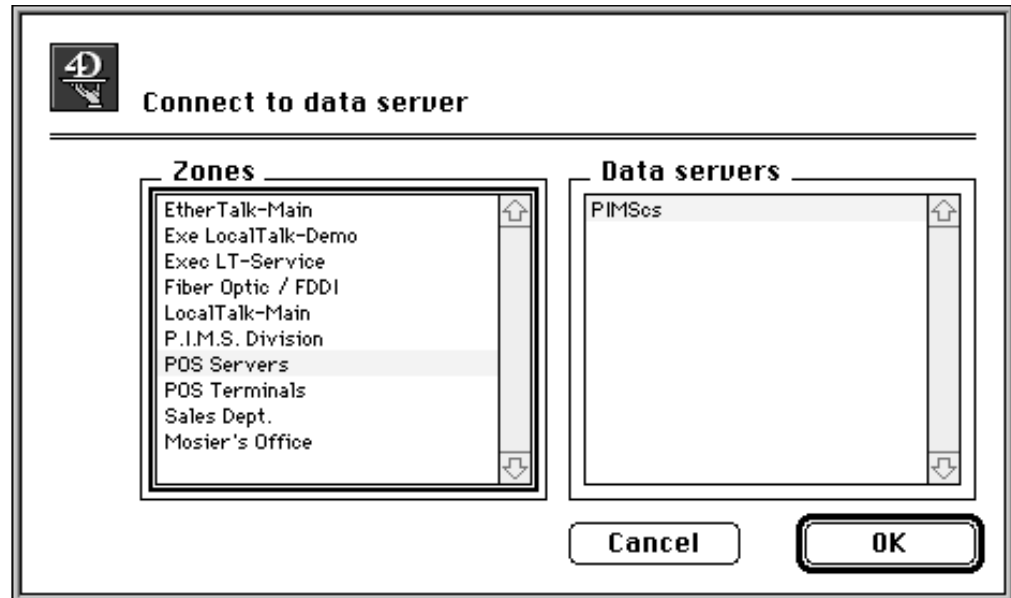


You can tell that P.I.M.S. and its datafile are loaded and available by the fact that they are listed in the upper left-hand corner of the server idle screen:



On Terminal:

To connect a Terminal to a Server running P.I.M.S., simply double-click on the Client application on that Terminal. The next screen you see will be the EDC Server select screen:



P.I.M.S. isn't running at this point. You are currently in the Client application only. This screen allows the Client application to select the desired Server. This specific screen is giving the user the ability to select different zones along with available Servers. Most users will simply get a dialog box displaying available Servers. At this point, make your selection.

Next, one of two things will happen:

If this is your Terminal's first time for tying into a new version of P.I.M.S. (this includes any upgrades from us), the Server will copy all of the necessary resources to your Terminal to construct a new P.I.M.S. application on it. This copying of resources is evident by a small window in the lower right-hand corner of the screen. It usually has "Copying Local Resources" displayed on it. This transfer happens only once for every new version of P.I.M.S. These resources are copied into a folder called "ACI" that the Client application created in your Preferences Folder, which is located in the System Folder. The combined size of these files is usually 4MB. Two files are either created or updated:

Every time there is an upgraded version of P.I.M.S. installed on the Server, the Server takes care of updating your Terminals for you!...

- P.I.M.S. C/S.res
- P.I.M.S. C/S.rex

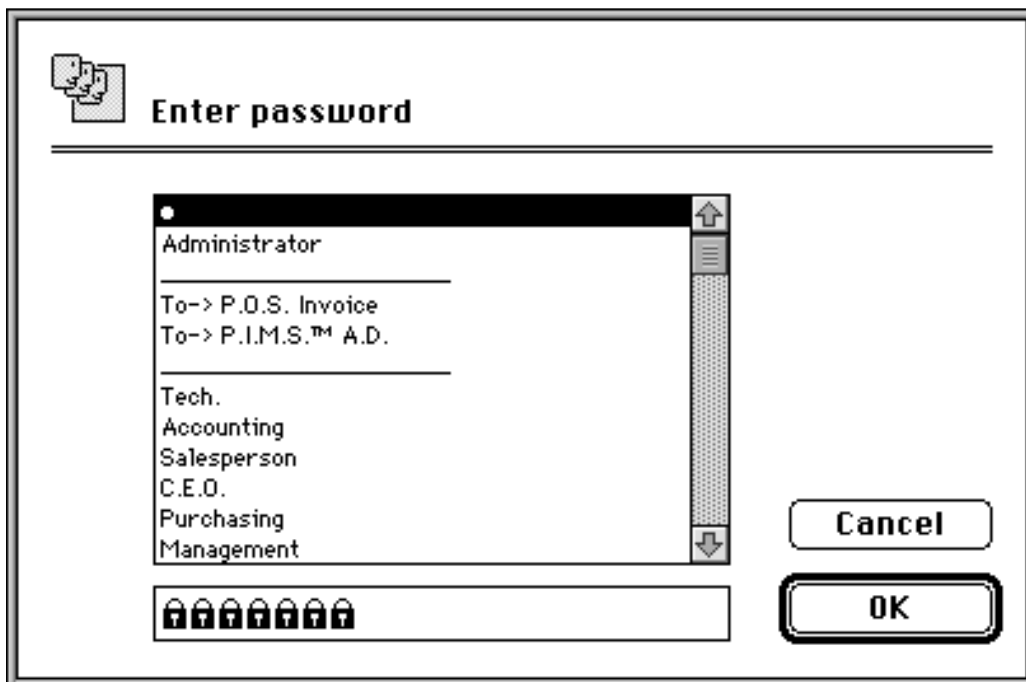


The ".res" file contains all of the information a Terminal needs to process information, control memory and serial ports, etc. The ".rex" file contains all of the screen graphics used to date. Every time a Terminal encounters a screen it hasn't seen before, it copies it from the Server and stores it in the ".rex" file. This way, the Terminal only needs to load a screen once over the network. This function dramatically increases Terminal performance and efficiency.

Both of these files take the name of the P.I.M.S. application running on the Server and adhere their suffix to it (.res & .rex). Because of this, you should never change the name of the P.I.M.S. application running on the Server. —Even if it is an upgrade from us, or one of your back-ups. As you can see, if your Terminal encounters a different P.I.M.S. Server, it will copy another new copy of the 4MB of resources to your Terminal. This is a good way to run out of hard drive space fast!

On a sound EtherNet network, initial resource transfer times range from 20 seconds to 2 minutes per Terminal, depending on the Macintoshes involved.

After the resources are done copying, or if this is the same old P.I.M.S. you tied into last time, you will now be prompted to select your user type and enter your password:



The original Password shipped with P.I.M.S. is a **single space** (" ")...

To get into P.I.M.S. for the first time, hit the **Spacebar** once and click OK...

Pressing **ENTER** or **RETURN** is the same as clicking OK...



+ *Setting up Passwords is discussed later on in the Using P.I.M.S. manual.*

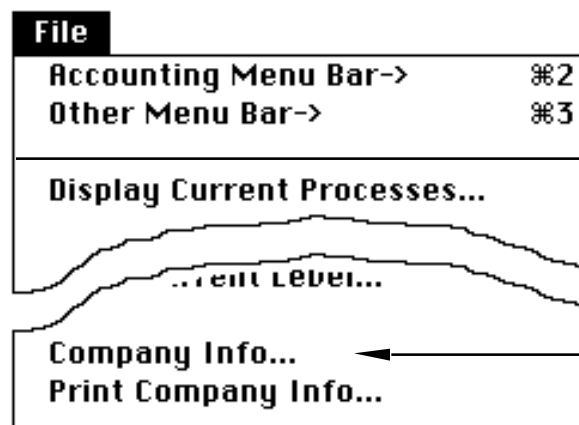
After gaining entry into the system, your Terminal will go through its start-up process. It will perform many tasks including a diagnostic of its environment, variable initiation and set-up, memory partitioning, etc. This start-up process takes about a minute to perform and is very important so please be patient.

INITIAL SET-UP:

We will take a few moments to cover the bare minimum information that P.I.M.S. needs in order to function as designed. All other information will be covered in the **Using P.I.M.S.** manual in detail. After we discuss these minimum requirements, we must discuss the proper methods of structuring your business to make the transition to Office Automation. This part will be the most important part of the documentation you will read...

Before using P.I.M.S. effectively, you must enter some information in order to give P.I.M.S. the tools it needs to operate.

Most of this information is entered into the **Company Info** section of P.I.M.S., so we will start there. To access this section of P.I.M.S., select **Company Info...** from the **File** menu (make sure your password access level allows you to do this or you will be denied):



Make this menu selection any time you wish to view/modify your Company Information and function controls...



COMPANY INFO:

The **Company Info** section of P.I.M.S. is where information concerning the functionality of the program is located. Such information consists of your personal company profile (name, address, phone, etc.), data defaults, and program controls.

Company Info is made up of the following sections:

Sections	
Main Page...	⌘1
Controls...	⌘2
Customer Display...	⌘3
SRO Symptoms...	⌘4
MacAuthorize™ Link...	⌘6
Custom Output Control...	⌘7
External Devices...	⌘8
Company Headers & Footers...	⌘9
Sounds...	
Sales Goal...	
Special Functions...	
Additional Tax Provisions...	
Required Plug-Ins...	
Custom Shipping Label...	

For now, we will concentrate only on those items that are necessary to fulfill P.I.M.S.' minimum requirements for proper operation. The rest will be covered in detail in the **Using P.I.M.S.** manual.

Step 1:

The first thing that must be done is the entering of your company profile. This information will be printed on various documents generated by P.I.M.S. Please enter this information into the following area.

COMPANY INFORMATION	
COMPANY: Waycool Computer Center	
ADDRESS: 1111 First Street	
CITY: Santa Rosa	
STATE: CA	ZIPCODE: 95403
PHONE: (707) 555-1212	
FAX: (707) 555-1313	
SHIP TO ADDRESS	
ADDRESS: 1111 First Street	
CITY: Santa Rosa	
STATE: CA	ZIPCODE: 95403
PHONE: (707) 555-1212	
TAX RATE: 7.5000%	
DEFAULT COST ROYALTY: 0.0%	
MINIMUM\$ FOR INVOICE CUSTOMER: \$100.00	



The name and address information is self explanatory,

TAX RATE —

This is the default tax rate that is used by the invoicing system. If you are using this program in a country other than the United States, this field will be left blank, and you will refer to the addendum for your specific country to explain the set-up procedures for the **Additional Tax Provisions** also contained in **Company Info**.

+ *The Invoicing system can also draw a tax rate from a Customer record or a County Tax Jurisdiction record. This will be discussed later.*

DEFAULT COST ROYALTY —

We will skip this field for now. It will be discussed later in the Inventory section of **Using P.I.M.S.**

MINIMUM\$ FOR INVOICE CUSTOMER —

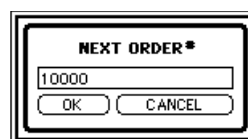
We will also skip this field for now. It will be discussed later in the Invoicing section of **Using P.I.M.S.**

The rest of the **Company Info** section concerns program control, and at present, is set to its default condition. For now we will leave it the way it is. In **Using P.I.M.S.**, we will discuss these other sections in detail. This includes Invoice template and printer selection.

Step 2:

SETTING UP INITIAL NUMBERING SEQUENCES:

P.I.M.S. contains several automatic numbering devices. These include devices for Purchase Orders, Receiving Records, Service Repair Orders, and most notably Orders. Two of these numbering engines allow a user to enter a starting value. They are Orders and SROs. For now, we will concern ourselves with the Order number. By default, P.I.M.S. starts its Order numbering at 10000. Most new users wish to start the numbering system at a point that coincides with their last system (either computerized or manual). To change the next Order number, select **Change Next Order Number...** from the **File** menu. After your menu selection, you will see the following dialog box:



In P.I.M.S., "Orders" refers to Quotes, Sales Orders, and Invoices collectively...



Before you go any further, you must decide (if you haven't already) how you are going to adapt P.I.M.S. to your business. Most of you will be starting from one of two positions:

- **Previously Automated/Computerized**
- **Never Computerized**

For those who are coming to us from other automated environments (and there's a lot of you!), you will need to forget some of the practices you have adopted in the past due to the limitations of your previous system. The reason you made the switch to P.I.M.S. was because you weren't happy with that other system, so don't try and make P.I.M.S. emulate it. It's time for you to pull back and re-think the way you'd like to do business.

For those who have never attempted to automate via computer, it's time for you to re-think your business as well. Many businesses wait until they are in total disarray before grabbing a product like P.I.M.S. to act as their "Knight In Shining Armor". They immediately throw P.I.M.S. into the fire and expect a Phoenix to appear and make their world a better place. There are also those who are "too busy" to fully understand what they are doing, or about to do. This is one of the biggest mistakes that can be made. If you are going to automate your business, you must be willing to take the time. — Especially if you are doing it alone, without the aid of a professional.

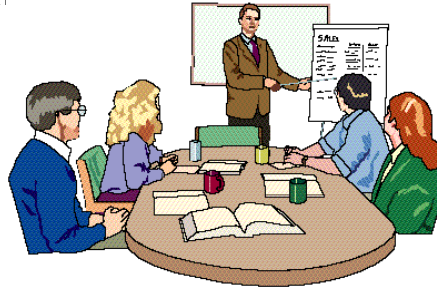
No matter what your starting point is, the following applies:

Before implementing something as sophisticated as P.I.M.S., you must first stabilize your business. If you are making mistakes due to procedure or policy, then P.I.M.S. will help you make ten times as many! We do not want to see this happen. Your first step should be to read ALL materials that came with your P.I.M.S. system, even if it doesn't apply to you. Some day it might! It is our experience over the past 15 years that the computer "Power-Users" who don't believe in reading manuals because it's "Mac" seem to have the most problems. There is never an excuse for not reading manuals.

By reading the manuals, even if you only skimmed them, you are now familiar with P.I.M.S.' capabilities and functions. Most people get many new ideas concerning their business that they never thought of before. With the knowledge of P.I.M.S.' abilities, you are ready to create a plan to implement P.I.M.S. into your business.



The next step is to get together with some of your key personnel and decide how best to structure the automation process. P.I.M.S. is extremely flexible and adaptable. It has over 9,700 functions. There is generally more than one way to accomplish a task or operation with P.I.M.S. Because of this, it is very important to develop a plan of attack ahead of time, as opposed to several weeks into it. This will insure that you are pointed in the right direction from the day you implement P.I.M.S., and forever after.



The best way to do this is to create an outline by talking about the following:

- **Describe Your Current Sales Process**

- Is there room for improvement?
- Who is responsible for what parts of the sales process?
- How do you want to track your sales? By department, rep, category, all?
- Do your sales people receive commission? If so, what is it based on? Is it more complicated than it has to be?
- Do you offer discounts based on category of product and quantity?
- Do you offer discounts based on "Family" grouping and quantity?
- Do you have different discount levels for different customers?
- Do you have special pricing needs for special customers (employee purchases, friends, etc.)?
- How do you process returns?
- What is the process for special orders? Do you collect deposits?
- What if a customer wishes to purchase something not in your system?
- What type of Invoices do you need/want to print out?
- Do you need to "hold" product aside for customers? If so, for how long?
- How do you distribute the product you receive?
- What do you base your stocking levels on?
- Do you ship product? Do you mark-up your shipping to handle other costs?
- Do you have flat-rates for your shipping? If so, what is it based on?
- What sales information needs to transfer to Accounting? Remember, with P.I.M.S. reporting capabilities, the number of chart-of-accounts does not need to be extensive at all.
- What are your taxable & non-taxable needs?
- Do you ever associate sales with jobs?



• Describe Your Inventory Needs:

- Do you categorize your inventory?
- Do different products belong to different sales accounts?
- Are commissions paid differently based on the type of product?
- Do you stock an inventory level?
- Does your inventory frequently fluctuate in cost? Do your vendors constantly adjust their pricing?
- Do you submit inventory or sales information to your vendors?
- Are you involved in a "Price Protection" relationship with your vendors?
- Do you use Weighted Cost Averaging?
- Do you have display models or demos?
- Do you track serial numbers?
- Do you ever deal with RMAs? (return merchandise authorization)
- Do certain products require additional information, warnings, etc.?
- Do some products have restrictions, minimum quantities, etc.?
- Does your product line have cross-Referencing needs?
- Do you deal in SKU items?
- Are some products required by other products to make a sale?
- Do you sell "bundles"? Do you want items that make up a bundle to list on the invoice? Maybe list without prices?
- What is your purchasing process?
- Do you divide your inventory purchases by "stocking" and customer back orders?
- Do you want purchase orders created automatically, manually, or both?
- Do you manufacture products out of your component inventory?
- Do you ever sell components as finished products by themselves?
- Do you sell items on consignment? If so, how do you divide the sale?
- Are there any products that are commission exempt?
- Are there any products that you wish to pay a different commission rate on?

• Miscellaneous:

- Do you need to limit access to the different sections of P.I.M.S.?
- Who will be responsible for administrating P.I.M.S.?
- Are you happy with your current accounting system?
- Has your chart-of-accounts become a little out of date?
- Do you have special reporting or tracking needs?
- Do your vendors or customers have special reporting needs?
- Who will install your P.I.M.S. system? Are they trained in this sort of thing? Have they been trained by ExecUtron Development, Inc.?
- Do you have a service department? What are their needs?
- Is your equipment and network sound enough to run P.I.M.S.?
- Will you be transferring information from a previous computer system into P.I.M.S.?

If you discuss these topics and develop solutions to them, you will have no problem implementing P.I.M.S. If you have any questions or concerns, check with your dealer or call ExecUtron directly.



SETTING-UP THE REST OF THE SYSTEM:

Now that you have been given some insight on the basics of P.I.M.S. and how to start the integration process of P.I.M.S. into your business, you are ready to start setting up your Files.

Initially, the order in which you start entering your data is an issue. If one File has other Files look to it for information, then Records for that File must be entered first. The initial hierarchy of Record entry looks something like this:

- 1) **Company Info**
- 2) **Payment Types**
- 3) **Departments (if any)**
- 4) **Categories/Subcategories**
- 5) **County Tax Jurisdictions (if any)**
- 6) **Vendors**
- 7) **Employees**
- 8) **Customers**
- 9) **Inventory - Components (if any)**
- 10) **Inventory - Finished Products**
- 11) **Bundles (if any)**

The order in which you enter data into these Files is important. For example: The Customer File may contain a Payment Type, Sales Rep, etc. so it is important, but not binding, that you had entered the Payment Types and Employees prior to entering the Customer. This way, you had the opportunity to enter the Payment Type and Employee while in the Customer entry screen. The same holds true for the other Files. The best order is the order in which the above eleven files are listed.

Entry screens for record entry generally contain dozens of fields. By no means are all of these fields required. They are there to add to P.I.M.S.' flexibility. Please don't feel that you must enter information into a field that does not apply to your business. However, some fields are required and P.I.M.S. will alert you if you try to leave them blank.

For information on the specifics of a certain File's characteristics, consult the **Using P.I.M.S.** manual.



IMPORTING DATA:

P.I.M.S. has the capability of importing almost any type of data into its most popular Files. The importation process filters the incoming information to remove "garbage" that might be present. There are also utilities to convert difficult import formats like "Fixed Length" and dEBase files. These converters filter information through P.I.M.S. and not into it. The filtered files can then be further massaged by the user before finally importing them into P.I.M.S. For more information, consult the **Using P.I.M.S.** manual. If you have any special file conversion or other import needs, contact your local P.I.M.S. dealer or ExecUtron directly.

- • This concludes the **Getting Started** portion of P.I.M.S. • •

ASSISTANCE:

With your purchase of P.I.M.S., you receive 90 days of free technical support. Please call our support line at:

(707) 525-3728, 9:00 - 5:00 PST M-F

Do not call our "800" number for support. This number is usually handled by an outside sales organization due to our volume of calls. By the time a support request is re-directed to our support department, a day or two might pass. If our support department lines and technicians are tied-up, leave a voice-mail message and they can generally respond back to you within a couple of hours at most. They can usually respond more efficiently to electronic transmissions such as FAX or E-mail if you have that available.

ExecUtron Development, Inc.

P.I.M.S. Division (USA)

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Santa Rosa, CA 95401 - USA

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e-mail (support).....support@executron.com
WEB site.....www.executron.com

After 90 days has passed, a support contract may be purchased if necessary...



This **Getting Started** manual is for initial set-up only. The information contained here is much more limited than the **Using P.I.M.S.** manual. Instead of looking in this Index, for the answer you're looking for, maybe you should consult the **Using P.I.M.S. Index?**...

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