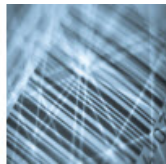


AIMsi Getting Started Guide

Tri-Technical Systems



INNOVATION & INTEGRATION

About AIMsi

What is AIMsi?

AIMsi (Accounting and Inventory Management systems integration) is a completely integrated point of sale and business software solution for the retail and consignment/resale industries. AIMsi operates in "real time" and all modules are interactive with each other. For example, accounting is automatically updated each time you complete a transaction, such as a new sale.

The AIMsi modules

AIMsi is a module-based POS software tool. This means that you can use and implement only the parts, or modules, that make sense for your business. Some modules are part of the "base" package and others are available as add-ons that you can purchase and implement when you're ready for them. Each module integrates seamlessly with the other modules and can greatly enhance your AIMsi experience. For information about the add-on modules, and how to purchase them, contact your Tri-Tech Sales representative.

Included in the base package: point of sale (POS), inventory management, accounts receivable (A/R), barcode label printing, gift and loyalty card processing, employee time clock, and security.

Available add-on modules: email capabilities, contact management, short-term rentals, accounts payable and general ledger (AP/GL), purchase orders (PO), lesson/appointment scheduling and billing, repair and service tracking, and long-term rental and sales contracts.

Benefiting from Active-e

For those of you who want or need an Internet presence, AIMsi is fully integrated with Tri-Tech's Active-e product. Active-e is our e-commerce software solution and features a shopping cart, business-to-business (B2B), and consumer-to-business (C2B) components.

Document overview

This document is intended for use by new AIMsi customers who need to install and complete the initial setup of AIMsi. It includes general information on installing AIMsi, setting up environment variables on your computers, and required setup steps. Feel free to follow the instructions on your own, or wait for the Install Navigator's call ([see page 1](#) for more information about the Install Navigator). You may also contact the Install Navigator directly or call Tri-Tech Support for assistance (see [Contacting Tri-Tech below](#) for more information).

Contacting Tri-Tech



Office hours

Our office hours are Monday through Friday, 8:00 A.M. to 5:00 P.M. Central Time (UTC-5).

After-hours support is available for customers with premium support. After-hours support is available Monday through Friday from 5:00 P.M. to 8:00 P.M. Central Time and Saturdays from 9:00 A.M. to 4:00 P.M. Central Time.

We are closed on the following US holidays: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, and Christmas Day.

Find us online

online at: <http://www.technology4retailers.com>

Sales and Administration

by phone: (563) 556-3556, ext. 1

by email: sales@technology4retailers.com

Training

by phone: (563) 556-3556, ext. 118

by email: training@technology4retailers.com

Technical Support

by phone: (563) 556-3556, ext. 2

You will be prompted for your 4-digit support access code; find this code on your certificate of purchase.

by email: Rather than emailing our support staff, we recommend that you call or visit the user forums when you need support. This is because of the possibility of email messages going to the email server's spam folder, miscommunication, and so forth.

Install Navigator

by phone: (563) 556-3556, ext. 2

You will be prompted for your 4-digit support access code; find this code on your certificate of purchase.

by email: in@technology4retailers.com

Additional options for customers with support plans

Member Portal

Go to the Member Portal (www.technology.com/t-MemberPortal.aspx) to take advantage of these features:

- A Support area with access to your Tri-Tech call history.
- A Downloads area with support documents, training videos, ancillary file downloads, and AIMsi software updates.
- Access to your account history and the ability to make payments on outstanding invoices.

Training options

Tri-Tech offers several different training options to aid you in learning AIMsi. One is training videos, available online in the Member Portal area of the Tri-Tech website. Once you are signed in to the Member Portal click the **Updates/Documentation** link in the **Downloads** section, highlight **Videos**, then click **Display Files**. Visit www.technology4retailers.com/t-training.aspx for more information on the other training options.



AIMsi online user documentation

To access the online user documentation, or help, after AIMsi is installed, point to the **Help** menu on the AIMsi main menu bar and click **AIMsi Help**. You can also access the AIMsi help by entering the following address into a web browser:

www.technology4retailers.com/AIMsiHelp/index.html.

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Program to Succeed

Tri-Tech's Program to Succeed ensures that all new AIMsi customers start off with a positive AIMsi experience.

Install Navigator

The technological expertise of each customer varies greatly. Some customers feel comfortable following a set of instructions to install and complete the initial setup of AIMsi unassisted. Some customers prefer to do some steps of the installation and initial setup unassisted and have Tri-Tech Support staff help with the remaining steps. Still others prefer Tri-Tech Support staff to complete the full installation and initial setup of AIMsi. Regardless of your particular comfort level, we are here to help! In fact, we assign each customer an Install Navigator who will be your guide through the process of installation, initial setup, and on through to training. Your Install Navigator will call you within a few days of your scheduled delivery of AIMsi software.

Your Install Navigator will:

- Confirm that you have received the software.
- Determine how much and what parts of the installation and setup you're comfortable tackling.
- Schedule an Install Consult call with a support technician. During this call the support tech will install AIMsi and set up the necessary maintenance requirements based on your individual business needs. If you have already completed these steps, the support tech will go through the setup and verify that everything looks correct. We recommend familiarizing yourself with AIMsi for several days after your setup prior to taking training.
- Make sure you receive the training you need. We have found that familiarizing yourself with AIMsi allows you to have the most successful training experience with in-depth questions about your specific business needs.



This is a basic overview of the steps you will need to complete to fully install your new AIMsi software.

Throughout this document, the machine where you install AIMsi will be referred to as your "server" because it is the machine that is "serving" your AIMsi software. It is not required that you install AIMsi on an actual server machine or that it be running server software.

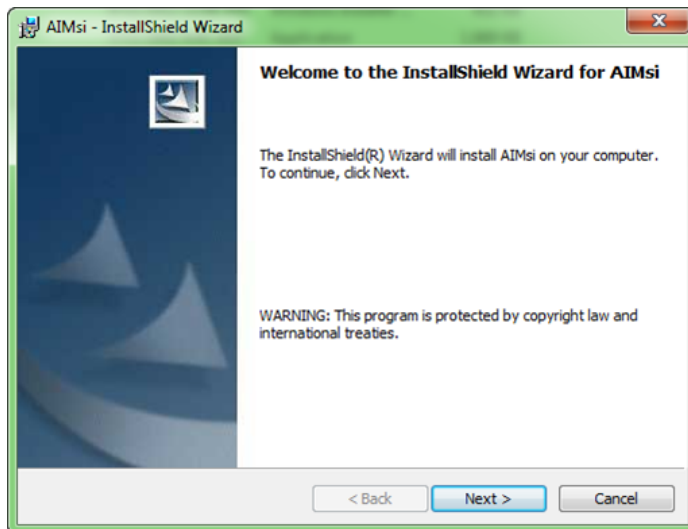
Feel free to contact Tri-Tech Support for assistance if needed.

1. Complete the steps in [Install the server copy of AIMsi below](#). All customers must complete these steps.
2. Complete the steps in [Access AIMsi from networked workstations on page 6](#) to install a "local copy" of AIMsi on each workstation that will access it. These steps need to be completed on all workstations that will access AIMsi across a network.
3. Complete the steps in [Set the environment variables on page 10](#) for each workstation that will access AIMsi.

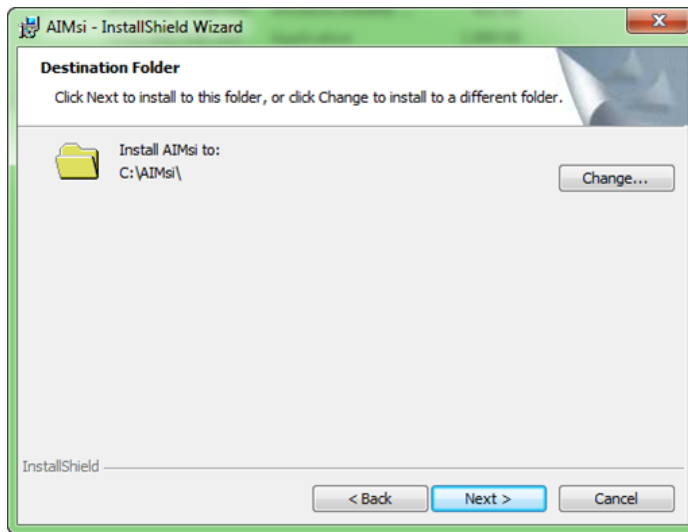
Install the server copy of AIMsi

Follow the steps below to install AIMsi on a stand-alone workstation or network server. The computer where you complete these steps will be considered your server; you may also choose to run AIMsi locally on this computer. For information about hardware and system requirements, refer to the Tri-Tech website (www.technology4retailers.com/t-aimsisystemreq.aspx) or contact your Sales representative.

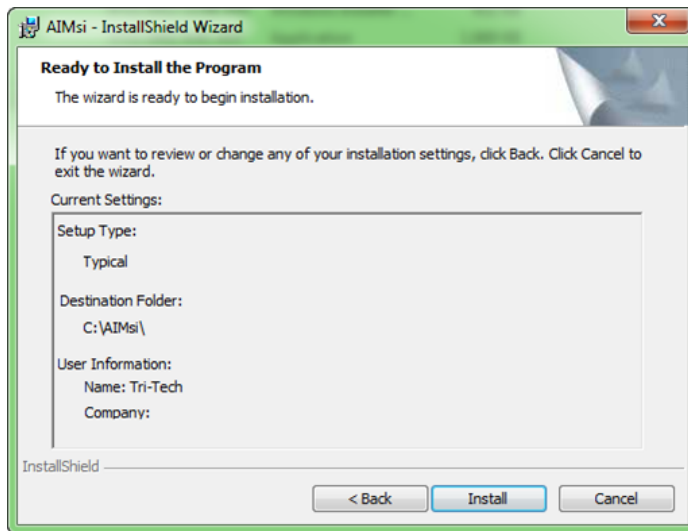
1. Insert the AIMsi CD in your computer's CD or DVD drive. A window automatically opens and displays the contents of the disc. If it does not, access Windows Explorer and open the CD or DVD drive.
2. Open the **AIMsi** folder.
3. Click or double-click setup.exe. The Installation Wizard opens and begins the installation process.



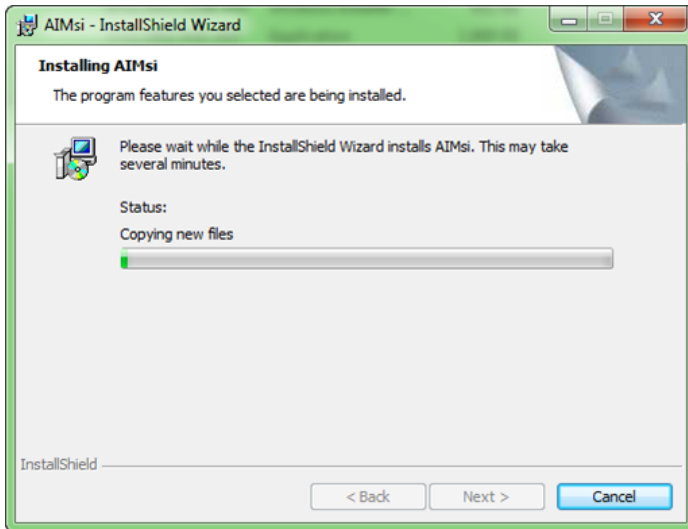
4. Click **Next**. The **Installation Wizard - Destination Folder** window opens.



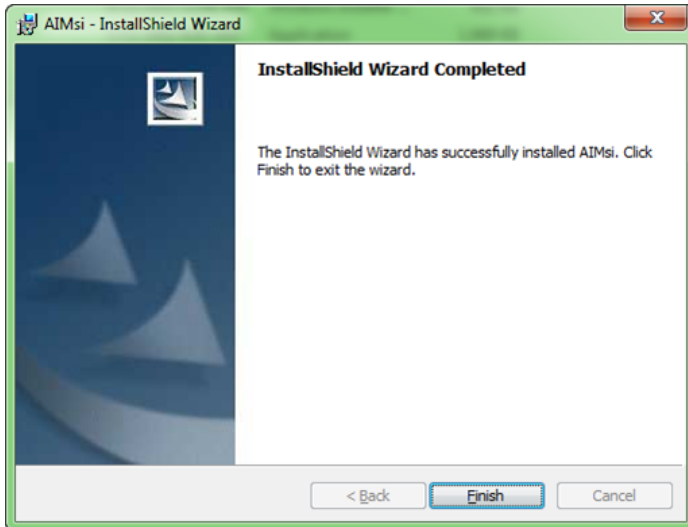
5. If desired, click **Change** to browse to a new folder location. Otherwise, accept the default location and click **Next**. The **Installation Wizard - Ready to Install** window opens.



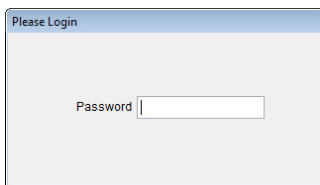
6. Click **Install**. The **Installation Wizard - Installing AIMsi** window opens.



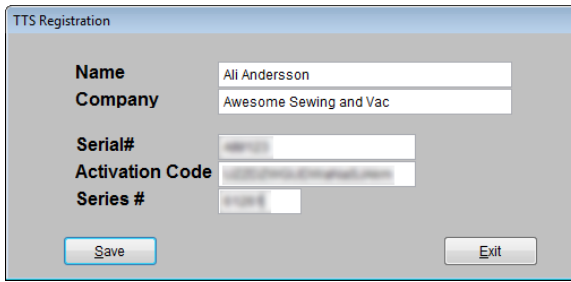
7. When the installation is complete, click **Next**. The **Installation Wizard - InstallShield Wizard Completed** window opens.



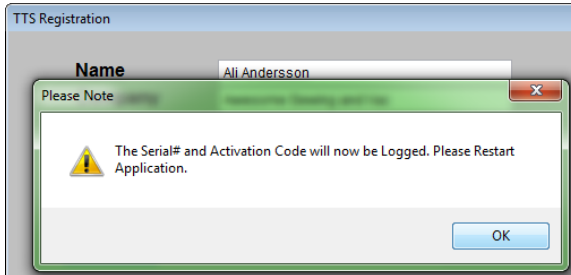
8. Click **Finish**.
9. In Windows Explorer, navigate to the location where you installed the software in step 4 (by default, C:\AIMsi).
10. Click or double-click AIMsi.exe to start AIMsi.
11. At the password prompt, type **PASSWORD**, in all uppercase.



12. On the registration window that displays, enter your name and company, and the serial number, activation code, and series number found on the AIMsi CD envelope. Enter the information exactly as it appears on the label.



13. Click **Save**.
14. Click **OK** on the message that displays indicating that you should restart AIMsi.



15. Continue to [Access AIMsi from networked workstations](#) below.

Access AIMsi from networked workstations

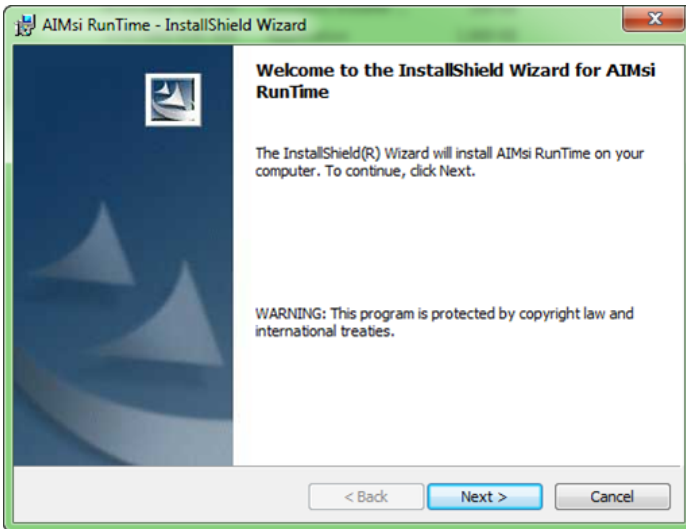
Follow the steps below to access AIMsi from any ancillary computers networked to your [server](#). These computers must be mapped to your server before you complete this procedure.

Note: You are not actually installing AIMsi on these workstations. Instead, you are installing the files necessary to access the installed copy that resides on your server.

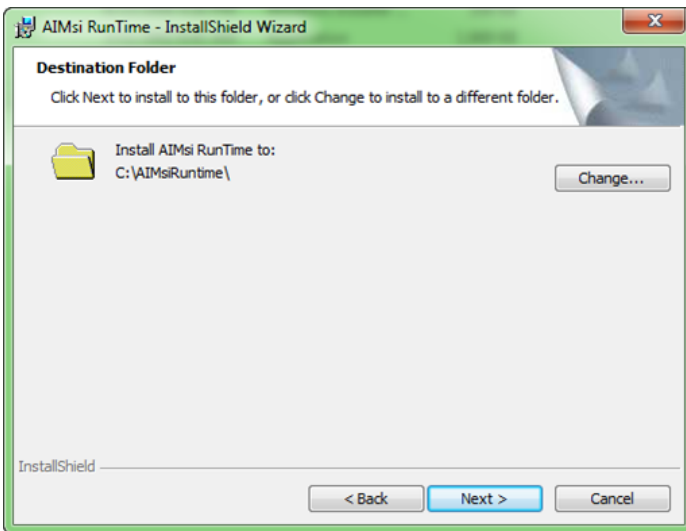
Prerequisites: You must complete the steps in [Install the server copy of AIMsi](#) on page 3 before you complete the following steps.

1. Insert the AIMsi CD in your computer's CD or DVD drive. A window automatically opens and displays the contents of the disc. If it does not, access Windows Explorer and open the CD or DVD drive.
2. Open the **AIMsiRuntime** folder.
3. Click or double-click setup.exe. The Installation Wizard opens and begins the copy process.

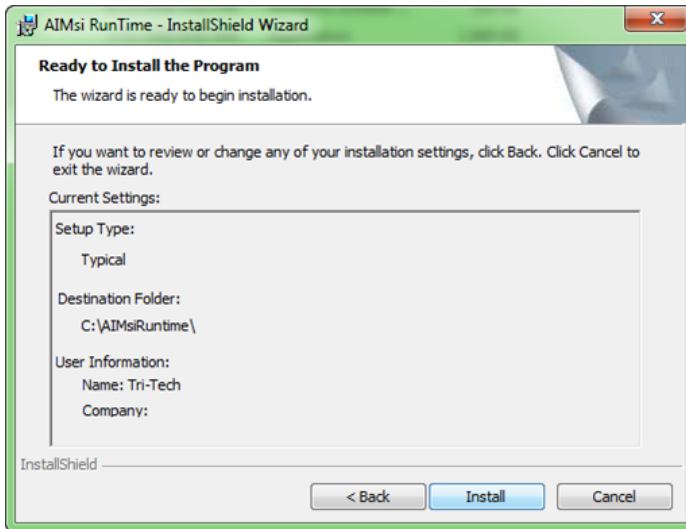




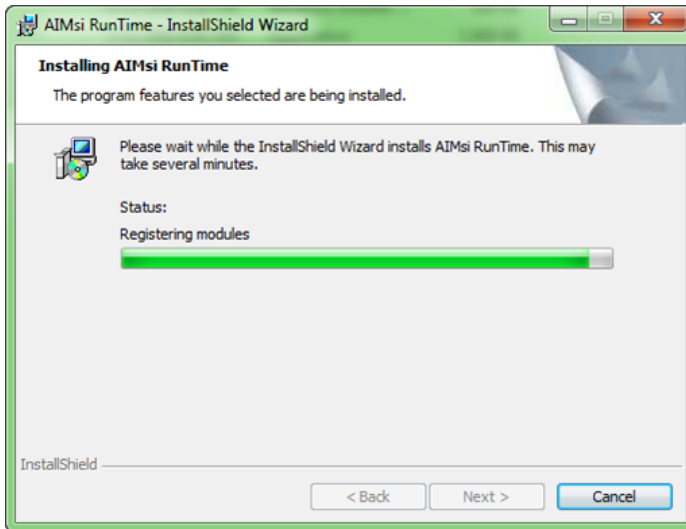
4. Click **Next**. The **Installation Wizard - Destination Folder** window opens.



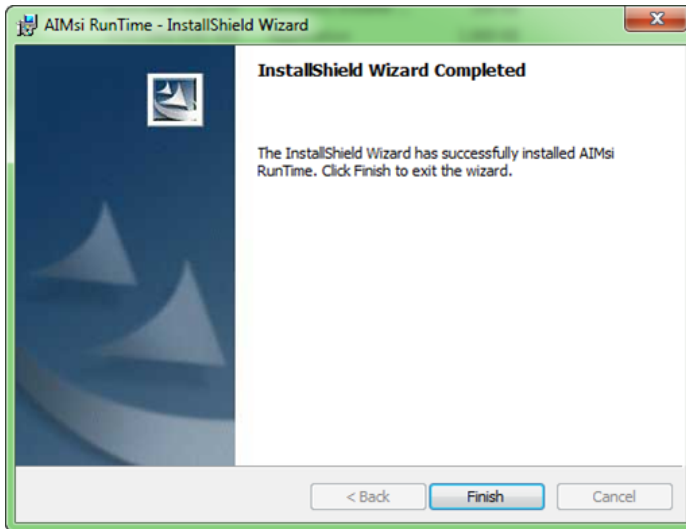
5. If desired, click **Change** to browse to a new folder location. Otherwise, accept the default location and click **Next**. The **Installation Wizard - Ready to Install** window opens.



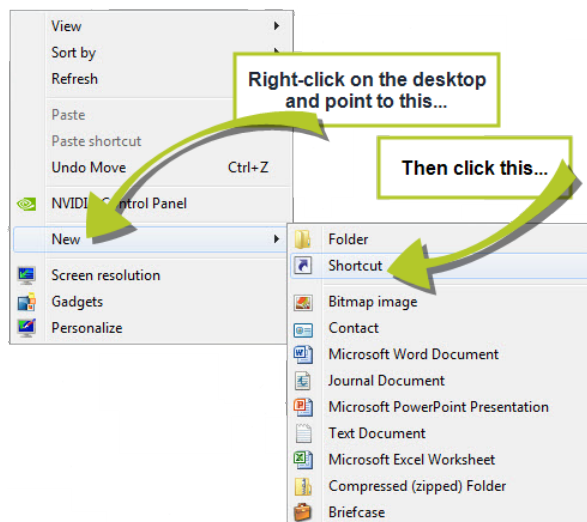
6. Click **Install**. The **Installation Wizard - Installing AIMsi** window opens.



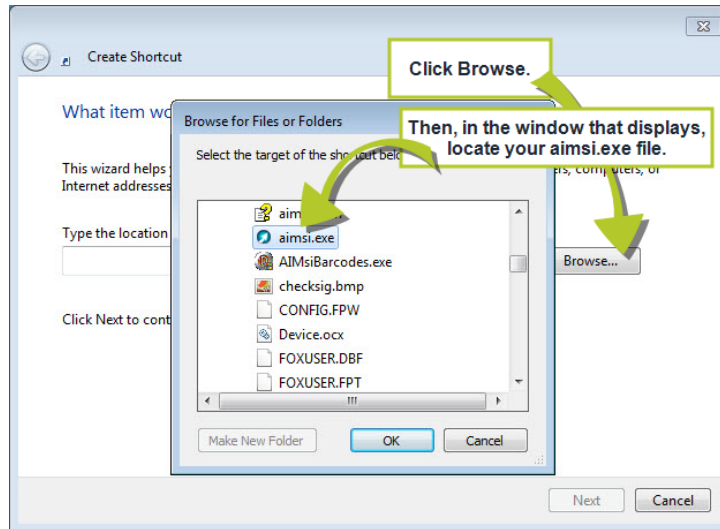
7. When the installation is complete, click **Next**. The **Installation Wizard - InstallShield Wizard Completed** window opens.



8. Click **Finish**.
9. Create a shortcut to AIMsi on the desktop. To do so:
 - a. Right-click on your computer desktop, point to **New**, and click **Shortcut**.



- b. On the **Create Shortcut** window, click **Browse**.
 - c. Navigate to the location where you installed AIMsi in [Install the server copy of AIMsi on page 3](#) (the default location is C:\AIMsi).
 - d. Select aimsi.exe and click **OK**.



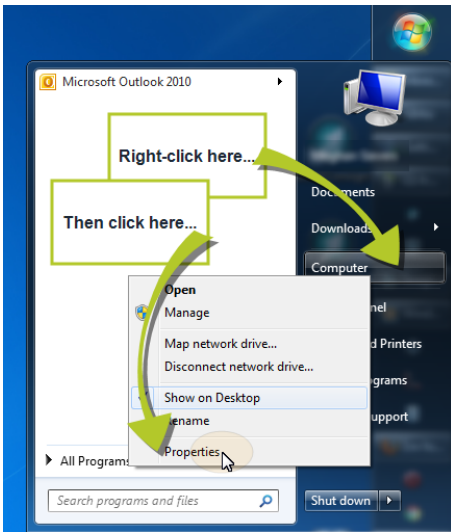
- e. Click **Next**.
 - f. Enter a name for the shortcut and click **Finish**. The AIMsi shortcut is added to your desktop.
10. Continue to [Set the environment variables below](#).

Set the environment variables

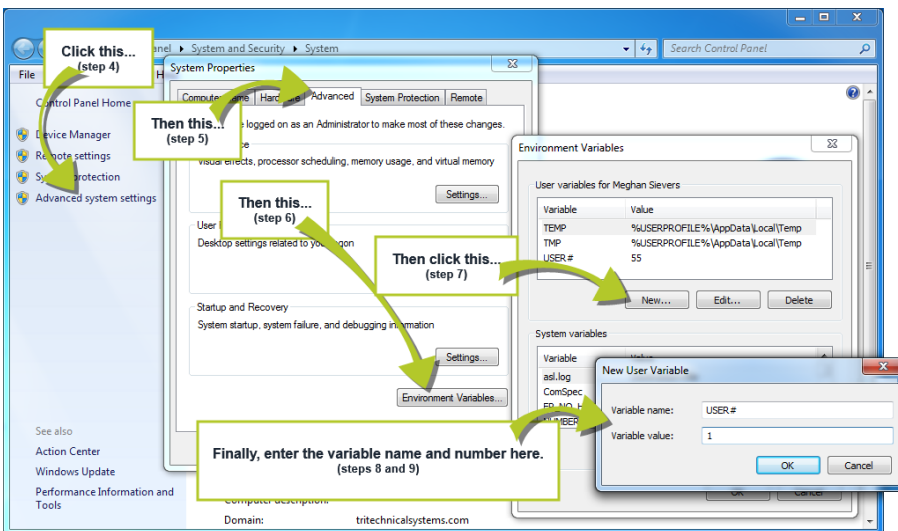
Each workstation that will access the AIMsi data files must be set up with an environment variable. Simply put, this is the identifying number for each individual workstation and each must be unique. The variables you create will be entered when you run the Setup Wizard on each workstation that will use AIMsi. Follow the steps below to create the environment variable on the workstations.

Set the environment variable (workstation number) in the Environment Variables properties on each computer. Each computer on a network must have a unique workstation number, regardless of physical location. The server must be workstation 1 if you are also using it as a workstation. Otherwise your first workstation or your stand-alone computer must be 1.

1. Close AIMsi if it is currently open.
2. Open the **Start** menu on your computer's desktop.
3. Right-click on **Computer** and click **Properties**.



4. On the **System** window, click **Advanced system settings**. The **System Properties** window opens.
5. Click the **Advanced** tab.
6. Click **Environment Variables**. The **Environment Variables** window opens.
7. Click **New** in the **User Variables** section.
8. Type **User#** in the **Variable name** box.
9. Type the unique workstation number in the **Variable value** box and click **OK**.



10. Repeat steps 1-9 for each workstation, making sure to increment the workstation number by one (1) each time.
11. Continue to [AIMsi Setup on page 13](#).



After [installing AIMsi](#) (on page 3) and [setting your environment variables](#) (on page 10), you are ready to begin your basic setup. Each employee must be given access to AIMsi with a unique password and specific permission to various areas of AIMsi. You also need to set up various maintenance options to suit the needs of your business.

AIMsi is installed with a default user that enables you to log in and establish your employees, groups, store locations, and so on. The default user has access to every function in AIMsi. Tri-Tech strongly recommends that you create new employee records for each employee who will use AIMsi.

Guidelines for setting up group permissions

Tri-Tech recommends that you [create permission groups](#) (see page 16) for your employees that allow access to specific functions in AIMsi, but deny access to others. For example, you might allow all users to start a sales transaction, but only some can reverse a transaction or open the cash drawer outside of a sale. For a complete list of secured functions in AIMsi, run the **Employee Securable Items** report. (On the **Reports** menu, click **Catalog**. Then click the **Miscellaneous** tab and select **Employee Securable Items**. Click **Run**, select an output destination, and click **OK**.)

Guidelines for setting up employee credentials

The default employee and password for AIMsi is **PASSWORD**, in all uppercase. Use this password to log in to AIMsi and [establish your employee log in credentials and permissions](#) (see page 17). Tri-Tech recommends setting up your employee passwords as follows:

- Always maintain at least one administrator account with full access to AIMsi.
- Create a unique employee account and password for each employee. This is important to track usage throughout AIMsi (for example, to track a user who reversed an invoice) and to use the employee time clock module.
- Keep the default AIMsi user but change the password from **PASSWORD** to something more secure as the default user has full access to AIMsi functions. You will be able to log in to AIMsi as the default user in the event that your user account becomes locked.

Guidelines for setting up inventory categories and subcategories

Inventory categories and subcategories classify the various types of inventory you stock. [Setting up these classifications](#) (on page 18) allows you to run inventory and sales reports that help you gauge how much of something you have in stock and how well certain categories are selling. Tri-Tech recommends that you take a look at your store's layout and consider how you organize your store and which items sell the best before you start creating new inventory categories.

Converting to AIMsi

If you are converting to AIMsi, Tri-Tech can write conversion scripts that will transfer your inventory, customers, and other data from your existing software into your new AIMsi software. For more information, contact Tri-Tech Support.



General steps for setting up AIMsi

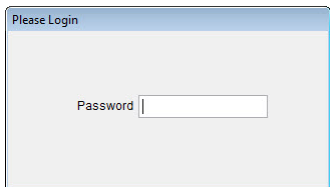
The following steps are a basic overview of the steps you will need to follow to complete the initial setup of your new AIMsi software. Feel free to contact Tri-Tech Support for assistance if needed.

1. Complete the steps in [Use the Setup Wizard below](#) to finish your initial setup.
2. Complete the steps in [Create permission groups on page 16](#) and [Set up employees on page 17](#) to assign your staff access to AIMsi.
3. Complete the steps in [Establish your inventory categories on page 18](#) to complete the first, and most important, steps to get started with your inventory.

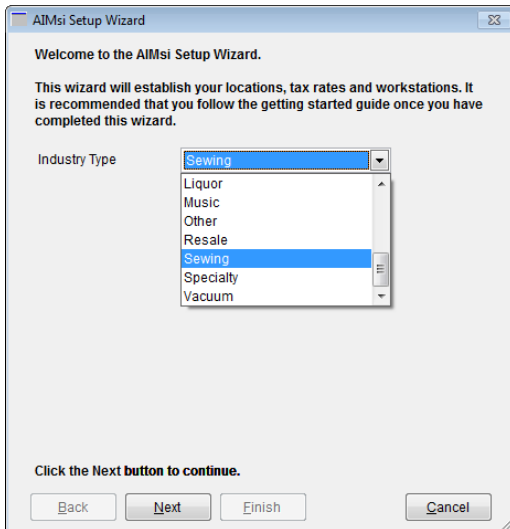
Use the Setup Wizard

Follow the steps below to begin the initial setup of your AIMsi software. The Setup Wizard will take you through the steps to identify location-specific information for each workstation, the workstation ID (environment variable), and more. It is important to note that the Setup Wizard will only help you complete the most basic setup information. The Setup Wizard automatically opens each time you log in to AIMsi until the information has been completed.

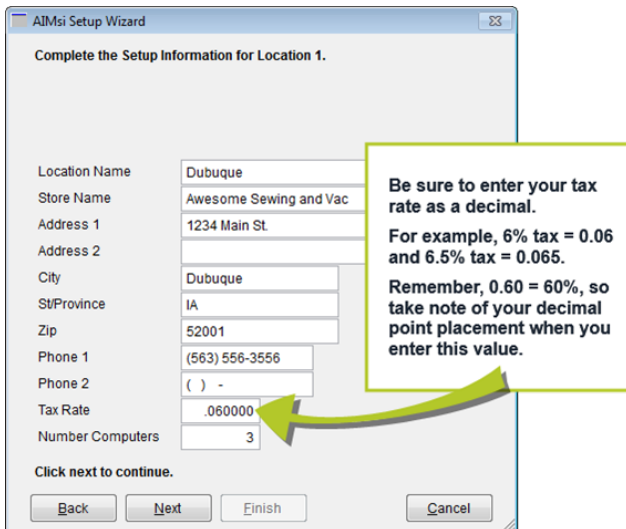
1. Log in to AIMsi as the default AIMsi user. The password is **PASSWORD**, in all uppercase. (You will change this password and create new user passwords later, in [Set up employees on page 17](#).)



2. The AIMsi Setup Wizard automatically displays. Select the industry that most closely matches your store.



3. Click **Next**.
4. Enter your store information.



5. Click **Next** to enter setup information for an additional store location. Otherwise, click **Finish**. You must enter information for as many locations as you purchased licenses for and the Wizard will continue to display the **Next** button until they are all entered. Once complete, the **Finish** button is available.
6. Continue to [Create permission groups on the next page](#).

What's done for you?

All of the following items are set up for you when you complete the Setup Wizard. Any additional setup for these items is completely optional.

- Your store locations are set up with store location codes. To add more details, point to **General Maintenance** on the **Maintenance** menu and click **Locations**.
- Your tax authorities and tax codes are created. To add more details, point to **General Maintenance** on the **Maintenance** menu and click **Tax Authorities**.

- Your workstations are assigned unique IDs, a store location, and a tax authority. To review, point to **General Maintenance** on the **Maintenance** menu and click **Work Stations**. Tri-Tech recommends that you specifically review these options and make sure everything is set up as desired (such as printers).
- A default **Cash Sale** customer type is created. To create additional customer default types, point to **Customer Maintenance** on the **Maintenance** menu and click **Customer Defaults**.
- A default **Cash Sale** store account is created with an associated store location, tax authority, and customer type (Cash Sale). To create additional store account types, point to **General Maintenance** on the **Maintenance** menu and click **Store Accounts**.

All of the following items are installed with default values when you install AIMsi. Tri-Tech recommends that you review the defaults and determine if changes are needed for your business, however, changes are not necessary to successfully use your AIMsi software.

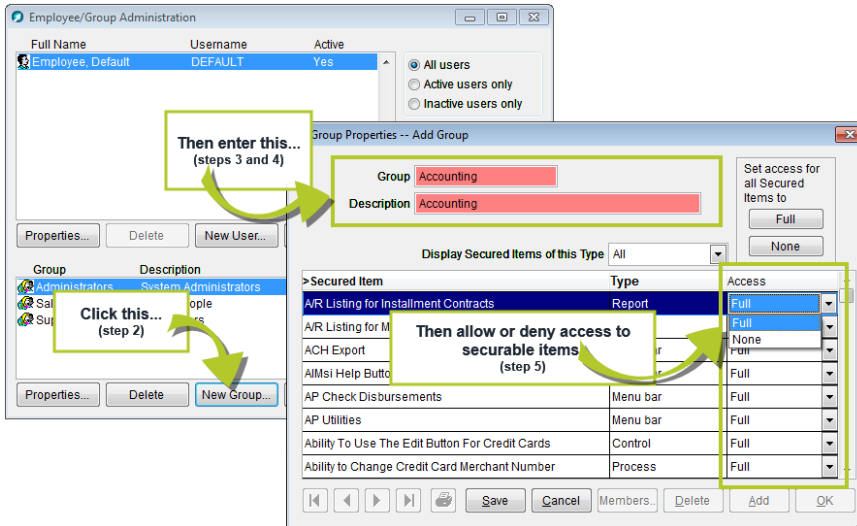
- Payment categories. To review, point to **Ledger Maintenance** on the **Maintenance** menu and click **Payment Categories**.
- Return payment categories. To review, point to **Ledger Maintenance** on the **Maintenance** menu and click **Return Categories**.
- Non-inventory categories. To review, point to **Ledger Maintenance** on the **Maintenance** menu and click **Non Inventory Categories**.

Create permission groups

Follow the steps below to create your permission groups and assign them to employees.

AIMsi is installed with three permission groups: Administrators, Sales People, and Supervisors. You can choose to assign these groups to your staff, but be aware that these groups initially have access to all AIMsi components. You can either change the access levels as you need or create new groups.

1. On the AIMsi main menu bar, click **Admin**, then point to **Employee/Security** and click **Employee/Groups**. The **Employee/Group Administration** window opens.
2. Click **New Group**. The **Group Properties – Add Group** window opens.
3. Enter a group name, such as **Accounting**, in the **Group** box.
4. Enter a description for the group in the **Description** box.
5. Use the **Access** column in the grid to allow or deny access to each secured item.



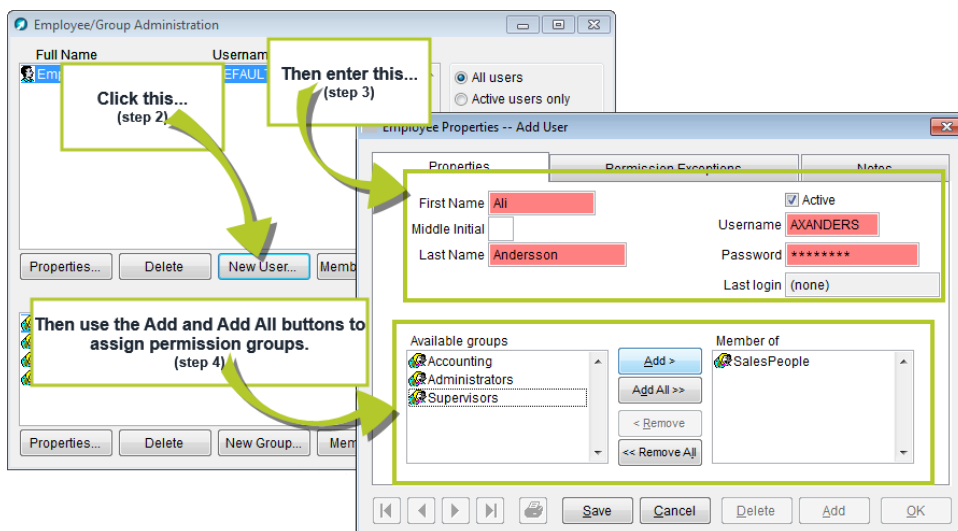
6. Click **Save**.
7. Click **Add** to create a new group. Otherwise, click **OK**.
8. Continue to [Set up employees below](#).

Set up employees

Follow the steps below to assign a user name, password, and permissions to an employee.

Prerequisites: You must have at least one permission group to be able to create and save a new employee record.

1. On the AIMsi main menu bar, click **Admin**, then point to **Employee/Security** and click **Employee/Groups**. The **Employee/Group Administration** window opens.
2. Click **New User**. The **Employee Properties – Add User** window opens.
3. Enter, at a minimum, the first and last names, a user name, and a password.
4. Select the group you want to assign the employee to in the **Available Groups** box. Ctrl-click to select more than one.
5. Click **Add** or **Add All**.



6. Click **Save**.
7. Click **Add** to create a new employee. Otherwise, click **OK**.
8. Continue to [Establish your inventory categories below](#).

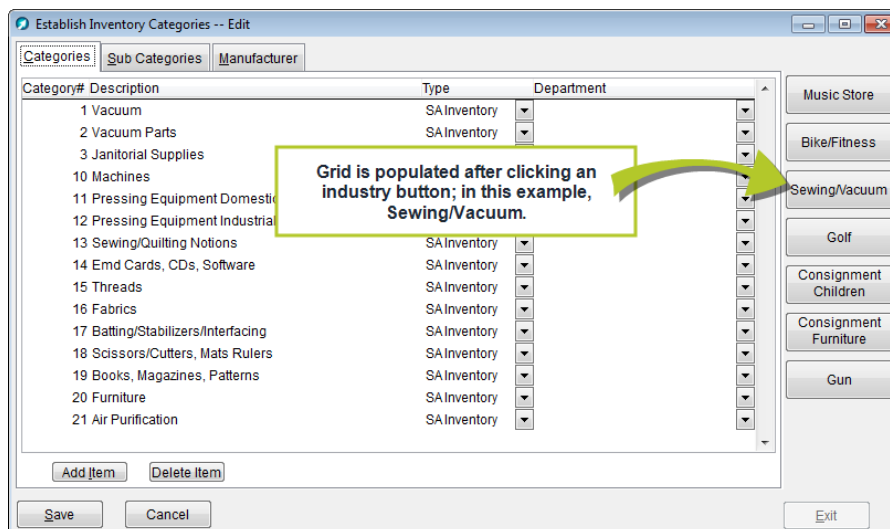
Establish your inventory categories

Follow the steps below to create inventory categories and subcategories for your business.

WARNING This is a one-time procedure. Once you've established your inventory categories or entered inventory into AIMsi, changes to your categories and subcategories **MUST** be made from the **Maintenance** menu in **Maintain Inventory Categories** and **Maintain Sub Categories**. Tri-Tech strongly recommends that once you've completed this procedure, you deny access to this function in the Permission Groups. You will lose data if you complete this procedure after you make changes to your inventory elsewhere in AIMsi.

AIMsi is installed with several basic category and subcategory definitions based on your industry type. These will be loaded for you based on the industry you choose on the **Establish Inventory Categories** window.

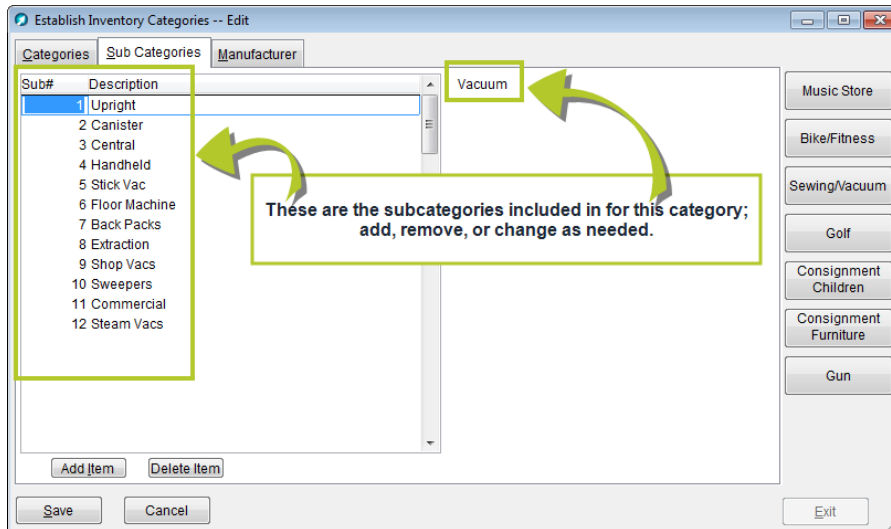
1. On the **Admin** menu, click **Establish Inventory Categories**. The **Establish Inventory Categories** window displays.
2. Select the industry that most closely matches yours from the buttons on the right. Relevant categories populate the grid.



3. Edit any categories as necessary directly in the grid. You may also choose to add or delete inventory categories based on your business needs.

Note: Any category you add must have at least 1, but no more than 99, associated subcategories.

4. Click a category and then click the **Sub Categories** tab to edit that category's subcategories as needed.



5. Click **Save**. Once you click save you will be unable to edit your new categories and subcategories from this window. Instead, you will need to update your categories and subcategories using the **Maintain Categories** and **Maintain Sub Categories** options on the **Maintenance > Inventory Maintenance** menu. Ledger accounts associated with each category are added to the chart of accounts; these accounts are cost of inventory, sales of inventory, and cost of goods sold.

What's next?

Now that you have the maintenance options established according to your individual requirements, you might be asking 'What now?'. The order in which you do things really depends on what areas of your business you want to computerize or 'get up and running' first. The following outlines briefly the steps we recommend you take to start tracking inventory and sales. This may be easily modified according to your needs and additional information about each can be found in the online help.

1. We recommend entering your serialized inventory first. Accessory and Title records may be created in AIMsi as the inventory is received at your store. You can start posting sales without having your entire store's inventory in the software.
2. Establish your customer accounts, including those with outstanding balances.
3. From the time you started entering your serialized inventory records to the time you finished, some of the items entered will have sold. You should sell those items in POS.
4. You're ready to start using POS! Refer to Point of Sale in the online help for information on all of the Point of Sale features, such as entering sales, proposals, layaways, posting customer payments, and more.

Additional considerations

Depending on your business needs and the AIMsi modules you have purchased, you may also wish to complete some or all of the following. All of these things can be completed from the **Maintenance** menu.

1. Prior to using the Service module, you must set up the service table and service status codes.

-
2. Prior to using the Purchase Order module, you must set up the problem codes and shipping codes.
 3. Prior to using the General Ledger module, you must verify that the system tables, categories and chart of accounts are set up properly.
 4. Prior to using the Rent and Sales Contract module, you must set up the rental defaults.
 5. Prior to using the Lesson/Appointment Scheduling & Billing module, you must set up the items on the **Lesson Maintenance** menu.
 6. If you are a consignment or resale store, complete the consignment options available on the **Maintenance > Inventory Maintenance** menu. Refer to the online help for details about this setup.

How can we help?

Don't hesitate to take advantage of our technical support and training options. Our training and support are designed to ensure that you get started on the right foot and have the help you need. We want you to be thrilled with your software and are here to help in any way possible!

There are two important tasks that you should complete to safeguard against loss of information in your AIMsi software: [create and use a test environment](#) (below) and [perform daily backups](#) of the software (on page 25) . Doing both of these things will ensure that your everyday copy of AIMsi stays error free and current.

A test environment allows you to train new employees, test new features, and other similar functions without affecting your "live" AIMsi software.

Backing up your software regularly ensures that, should a loss of data occur, you will be able to restore your information with little to no frustration.

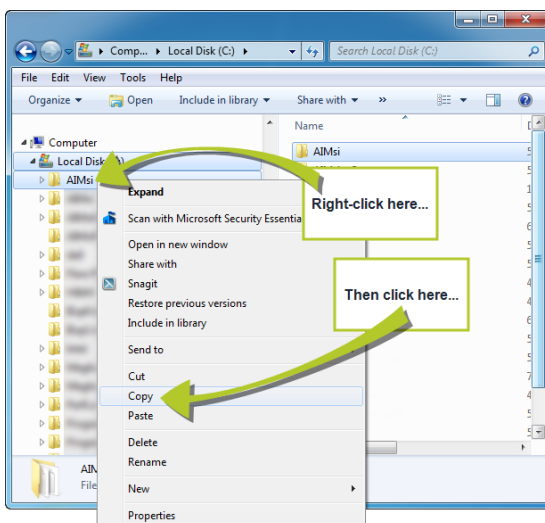
Create a test environment

Tri-Tech recommends creating a copy of your AIMsi software to use as a test system. You can use this copy to train new employees, learn new modules, or simply test how certain transactions affect various records in AIMsi — all without affecting your live data.

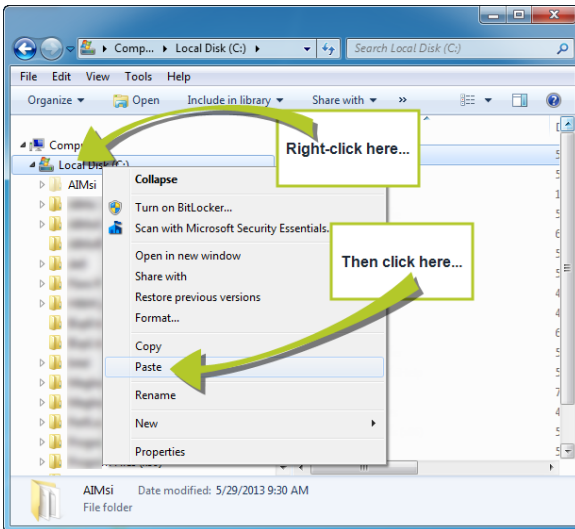
It is simplest to create a test environment on your server and point to it from the other networked workstations. In this way, when you apply AIMsi updates, you only need to do it once.

Prerequisites: Close AIMsi on all of your workstations before beginning this procedure. Then, complete these steps on your AIMsi server (refer to [Install the server copy of AIMsi on page 3](#) for additional information; the default location is C:\AIMsi).

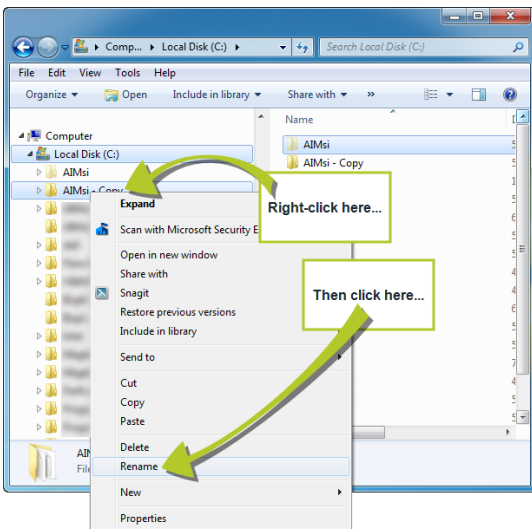
1. Access Windows Explorer and navigate to the location where you installed AIMsi.
2. Right-click on the AIMsi folder and click **Copy**.



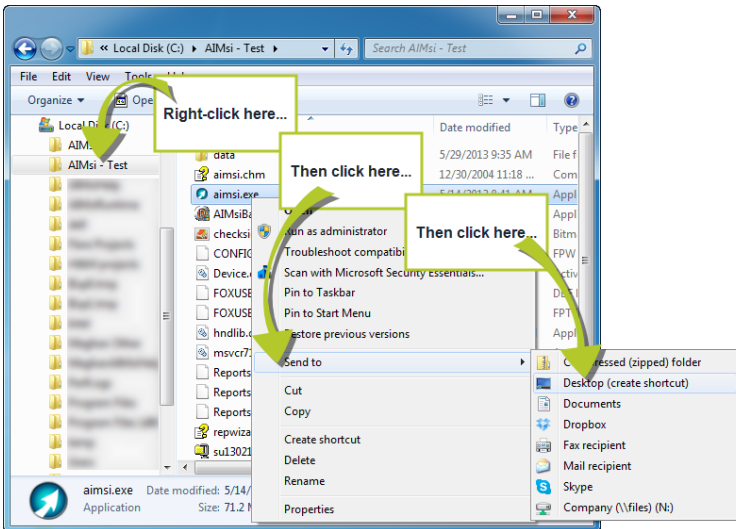
3. Right-click on the folder where you want the test system and click **Paste**. Often, this will be the root folder, (C:).



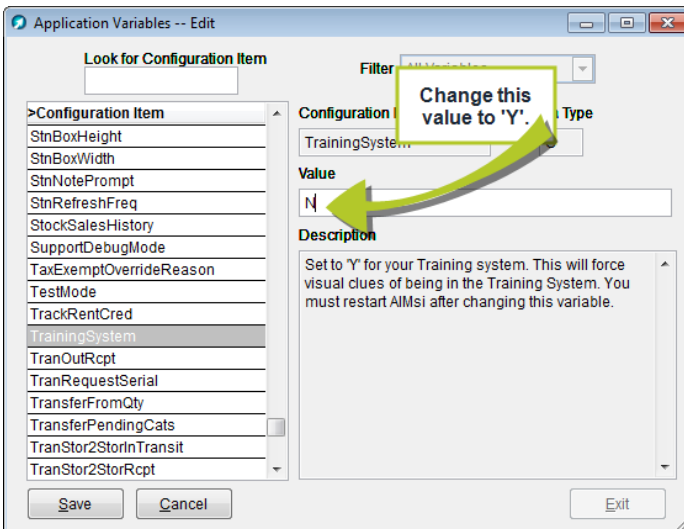
4. Right-click on the **AIMsi-Copy** folder and click **Rename**.



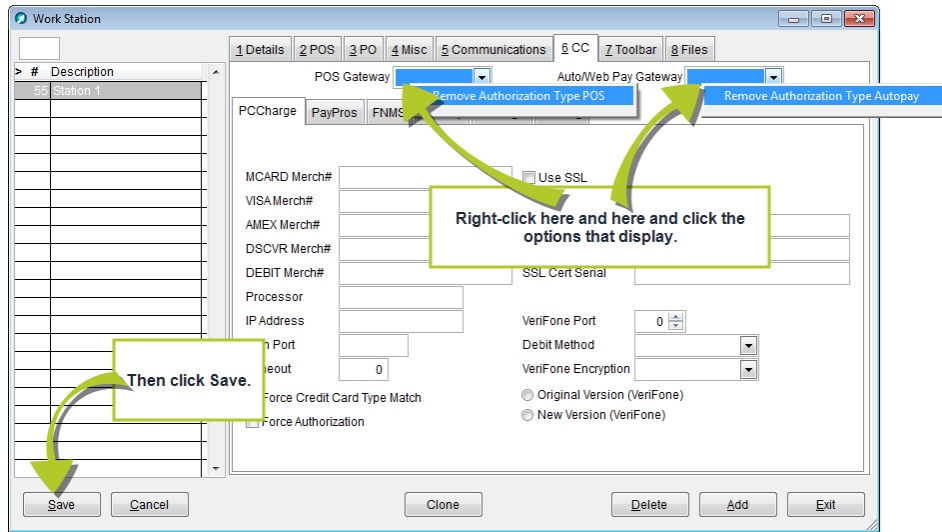
5. Give the folder a meaningful name, such as **AIMsi - Test** (this will help distinguish it from other AIMsi environments you might have).
6. Open the AIMsi - Test folder.
7. Right-click the aimsi.exe file and point to **Send to** then click **Desktop (create shortcut)**.



8. On your desktop, right-click your new shortcut and click **Rename**.
9. Enter a new, meaningful name for the shortcut, such as **AIMsi - Test** (this will help distinguish it from other AIMsi shortcuts you might have on your desktop).
10. Open your test AIMsi and log in.
11. On the main menu bar, click **Maintenance**, then point to **General Maintenance** and click **System Variables**.
12. Set the value for **TrainingSystem** to **Y**; this will change the AIMsi workspace from white to blue as a visual indicator that this is a test system.

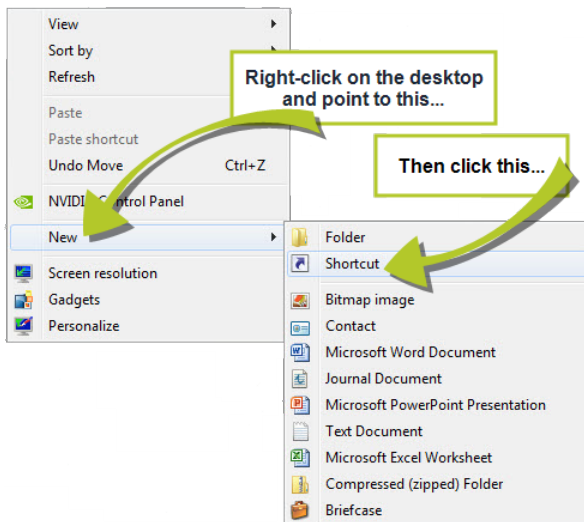


13. Turn off credit card processing. To do so:
 - a. On the main menu bar, click **Maintenance**, then point to **General Maintenance** and click **Work Stations**.
 - b. On the **Work Station** window, click the [CC tab](#).
 - c. Right click in the **POS Gateway** and **Auto/Web Pay Gateway** boxes and click **Remove Authorization Type POS** and **Remove Authorization Type Autopay**, respectively.
 - d. Click **Save**.



14. Create a desktop shortcut to the test environment on each networked workstation that should have a test environment. To do so:

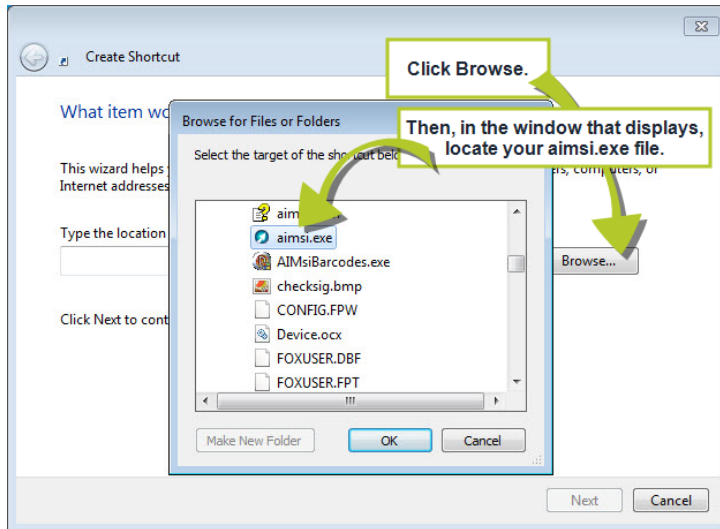
a. Right-click on your computer desktop, point to **New**, and click **Shortcut**.



b. On the **Create Shortcut** window, click **Browse**.

c. Navigate to the location where you installed AIMsi - Test.

d. Select aimsi.exe and click **OK**.



- e. Click **Next**.
- f. Enter a name for the shortcut and click **Finish**. The AIMsi shortcut is added to your desktop.

15. Repeat steps 1-14 to create test environments on any server where AIMsi is installed. Then, continue to [Back up AIMsi](#) below.

Note: You will need to update this test system each time you apply AIMsi software updates to your live system.

WARNING Be sure to turn off credit card processing (steps 13.a-d) in all test systems on all workstations. Failure to do so may result in false credit card charges being sent to your credit card processor. You must do this every time you copy your Live system to create a new Test system.

Back up AIMsi

Important! Tri-Tech strongly recommends backing up your AIMsi system daily.

AIMsi contains invaluable information, the loss of which will create a hardship for your business and it is imperative you back up AIMsi daily. We recommend that you keep your backup media offsite to prevent against fire or other unexpected damage or loss of your backups.

We also recommend that you test the backups on a weekly basis to verify the media is still good and the backups are actually working.

How to back up your software

Back up the entire AIMsi folder on the server where AIMsi was installed ([Install the server copy of AIMsi on page 3](#)); be sure to include all of the subfolders. If you are unsure what backing up entails or the media to use, contact your local computer consultant for assistance.



ALWAYS make sure AIMsi is closed on **ALL** workstations before you begin a system backup.

What you use to back up your software is entirely your choice. One option is using an online data backup and recovery service. Tri-Tech has partnered with Divinsa in order to help make the backup process more automated and secure for you. The benefit to using an online service such as Divinsa is that it eliminates the hands-on task of completing a backup. For more information on Divinsa, please visit their website at www.divinsa.com or contact Tri-Tech Sales.

Alternatively, you can choose to copy AIMsi to another location on your computer, an external hard drive, or a flash drive.

What's my password?

Wondering how to log in to AIMsi for the first time? Not sure what password to use? No problem. Use the default AIMsi password: **PASSWORD**.

Tips and tricks

This section outlines various keyboard shortcuts and other techniques that you can use to make using AIMsi a little easier.

Alt, Ctrl, and Function keys

Alt, **Ctrl**, and **Function** keys are important aspects of navigating through AIMsi without the use of a mouse. Depending on the keystroke sequence, combination, or function, you can access various menus and windows, search boxes, and buttons. These three options are described in more detail in [Keyboard shortcuts on the next page](#).

Right mouse clicks

Often in AIMsi, right-clicking with your mouse on a window or box will yield additional options on a pop-up menu. For example, you may right-click to clear a selection in a drop-down box or copy a customer's email address to your clipboard. You can right-click in a grid to select from a variety of functions for the grid items, such as selecting them all. Right-clicking on a Report Catalog report setup window allows you to save those report preferences for use later.

Escape key

Press the **Esc** key on your keyboard to close the active window in AIMsi.

Tab key

Press the **Tab** key to move your cursor between items on AIMsi windows. Press **Tab** to move to the next box in sequence on a window and press **Shift+Tab** to move backward.

Date boxes

To quickly enter dates in date boxes you can do any of the following.

- Press **F6** to open a calendar to select a date.
- Press **T** to populate the box with today's date.
- Press the **En Dash** (—) key (or the **Minus Sign** (-) key on your keyboard's number pad) to shift the date back by one day.
- Press the **Equal Sign** (=) key (or the **Plus Sign** (+) key on your keyboard's number pad) to shift the date forward by one day.
- Press **Page Up** to shift the date back by one month.
- Press **Page Down** to shift the date forward by one month.

Note boxes

To quickly add the date, time, and your user name to any notes box, press **F4** on your keyboard.

List boxes

List boxes are windows you can use to search for various types of information. They display automatically, such as when you enter consignment inventory, or on-demand, such as when you press **F6** in the **Ledger** box on the **General Journal Entry** window. The titles of list boxes, such as the **Pick Customer** window, may or may not be consistent. Often the title of the window will be relevant to the function. For example, if you start a sales invoice, the title of the **Pick Customer** window is **Sales Invoice**. If you start a layaway, the same window will display **Layaway** in the title bar.

Grids

Grids, or tables, display on many windows in AIMsi. Grids throughout AIMsi have several features in common.

- Grid column labels that are in bold font can be sorted. For example, on the **Pick Customer** window, you can click the **Acct#** column heading to sort the grid in order of account numbers.
- The column the grid is currently sorted on includes a **Greater Than Sign (>)** or **Less Than Sign (<)**. For example, if a grid is currently sorted in ascending order on **Acct#**, the column heading is **>Acct#**. If it is sorted in descending order on **Acct#**, the column heading is **<Acct#**.

Keyboard shortcuts

Keyboard shortcuts are ways to access information in AIMsi using only your keyboard. These can include function keys (F1-F12) or keystroke sequences and combinations with the **Alt** and **Ctrl** keys.

Function keys

Function keys open various AIMsi functions or perform various actions. For example, **F11** displays the workstation number and description, current user, location, and tax authority for a workstation. (Press **F11** again to close the **Workstation Information** window.)

Common Function keys:

F5	Opens the Point of Sale menu bar.
F6	F6 in AIMsi in a date or list box will open any relevant search windows. For example, pressing F6 in Date boxes opens a calendar where you can select the date, in Vendor boxes it opens a list of vendors, and in boxes needing a ledger number it allows you to select from a list of ledger numbers. F6 is a very common function key in AIMsi and can be used to search for information or dates on many of the windows.
F7	Opens the cash drawer.
F12	Saves the current transaction.

Alt key

Keyboard shortcuts that use the **Alt** key are performed in a sequence or may be a combination. These keystroke sequences and combinations open menu items or complete a command (such as "clicking" a button).

If a keyboard shortcut is documented with commas between the keystrokes, it is a sequence shortcut. For example, **Alt, Q** (press **Alt**, then press **Q**) opens a Quick Sale.

If a keyboard shortcut is documented with plus signs between the keystrokes, it is a combination shortcut. For example, **Alt+E** (press **Alt** and **E** at the same time) closes various windows throughout AIMsi.

Alt key sequences and combinations can be visually identified in AIMsi by locating, then typing, the underlined letters. For example, to open the **Modules** menu, press **Alt, M**. To open the Sales Invoice, you would use the menus **Modules > Daily Posting > Sales Invoice** or press **Alt, M, D, I**. To close the Sales Invoice, press **Alt+C**.

Common Alt key sequences are:

Alt, Q	Opens the Quick Sale function.
Alt, L	Signs the current employee out of AIMsi.
Alt, X	Closes all open windows in AIMsi and closes AIMsi.
Alt, R, C	Opens the Report Catalog.
Alt, M, I, A, S	Opens the Enter New Inventory window where you can enter a new SKU.

Ctrl key

Keyboard shortcuts that use the **Ctrl** key are performed in a combination. These keystroke combinations open menu items or complete a command (such as "clicking" a button). **Ctrl** key combinations are primarily used in the Point of Sale module, with the exception of merchandise returns.

Common Ctrl key combinations:

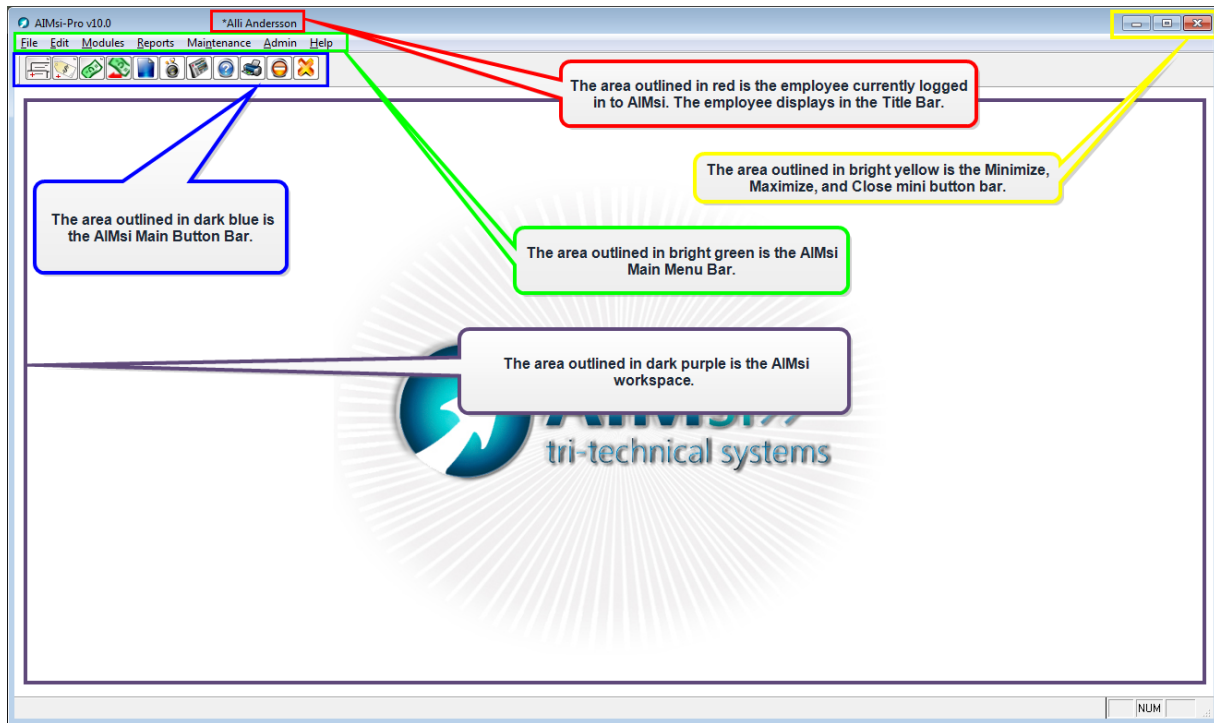
Ctrl+I	Opens the sales invoice.
Ctrl+O	Opens open account (OA) payments.
Ctrl+Y	Opens layaways.
Ctrl+P	Opens proposals.
Ctrl+M	Opens merchandise returns.

Components of the AIMsi workspace

The AIMsi screen, or workspace, contains the following:





- **Title bar:** The title bar is at the very top of the screen. Near the center of the title bar is the name of the employee currently logged in (**Default Employee** if **PASSWORD** was entered as the password when you signed in to AIMsi). On the very right are **Minimize**, **Maximize**, and **Close** buttons.
- **Menu bar:** The menu bar is second from the top and includes these options: **File**, **Edit**, **Modules**, **Reports**, **Maintenance**, **Admin**, and **Help**. Each of these is described in detail throughout the online help.








- **Button bar:** The main button bar is third from the top and contains the buttons outlined below. The main button bar is your primary navigation tool for AIMsi and provides quick access to a variety of different features. Some of these buttons display based on system variable settings and some can be secured based on user permissions.
- **Workspace:** The workspace is the area below the Button bar where the AIMsi windows display when open.



The Main button bar buttons

The table below describes the buttons available to you, with the appropriate user setup, on the Main button bar.

Button	Description
Standard buttons	
 New POS Transaction	Click to open the Point of Sale button bar where you can begin a point of sale transaction that includes a new sale, service tickets and contracts, approvals and demos, proposals, short and long-term rentals, layaways and special orders, loaners, and E-cards.
 Quick Cash Sale	Click to open the Sales Invoice window where you can complete a "quick" sale, or a sale that is not for a specific customer account.
 Tri-Tech News	Click to see what's new at Tri-Technical Systems. The Tri-Tech website opens up on the News page (www.technology4retailers.com/news.aspx).
 AIMsi Help	Click to access the online help for AIMsi (www.technology4retailers.com/AIMsiHelp/index.html).

	Button	Description
	Report Catalog	Click to open the Report Catalog window and generate reports detailing your inventory, general ledger, purchase orders, accounts payable, and more. You can also generate service and letter reminders.
	Log Out	Signs the current user out of AIMsi but leaves AIMsi open for another user to sign in. Caution: Tri-Tech strongly recommends that employees log out of AIMsi if they walk away from the workstation so that it remains secured and individuals who are not approved for access cannot gain access to your store information.
	Exit AIMsi	Signs the current user out of AIMsi and closes AIMsi.
Other optional buttons		
	Receive Batch Consignment	Click to open the Enter Consignment (Batch Mode) window where you can enter your consignment inventory without manually assigning SKU and serial numbers. The system variable IndustryType must be set to Consignment to include this button on the Main button bar.
	Receive Batch Purchase	Click to open the Enter Purchase (Batch Mode) window where you can enter inventory you've purchased outright from a customer without manually assigning SKU and serial numbers. The system variable IndustryType must be set to Consignment to include this button on the Main button bar.
	Settle Batch Consignment	Click to open the Settle Consignment (Batch Mode) window where you can settle with one or more consignors at a time for merchandise sold. The system variable IndustryType must be set to Consignment to include this button on the Main button bar.
	Refund Deposit/Credit	Click to open the Refund Deposit/Credit window where you can refund a credit with cash, check, or other form of payment. The system variable IndustryType must be set to Consignment to include this button on the Main button bar.



QR codes

Throughout this document you probably noticed a few black boxes in the margins. If you're unfamiliar with these, they are QR (Quick Reference) codes. These codes provide links to information such as websites, videos, emails, and so on. For the purposes of this document, they are all links to websites. To use a QR code, you need a smart phone and an app to read the code. Once you have an app downloaded to your phone, it's as simple as opening the app and pointing your phone at the QR code.

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