FOCUS Service Management Software Version 8.5 for Passport Business Solutions Installation Instructions

Thank you for purchasing Focus Service Management Software from RTM Computer Solutions. This booklet of installation instructions will help get you up and running with Focus. Should you have any problems or questions concerning the software, technical assistance is available by contacting you dealer or RTM at 410-335-8350.

Windows systems

- If you are installing Focus for the first time, please follow the *Focus New Installation Instructions for Windows*, on page two.

- If you are installing this software as an update to an existing Focus installation, please follow the *Focus Update Installation Instructions for Windows*, on pages three through seven.

UNIX/Linux systems

- If you are installing Focus for the first time, please follow the *Focus New Installation Instructions for UNIX/Linux*, on page eight.

- If you are installing this software as an update to an existing Focus installation, please follow the *Focus Update Installation Instructions for UNIX/Linux*, on pages nine through thirteen

FOCUS New Installation Instructions for Windows

Please read this entire document carefully before beginning the installation. Focus version 8.5 is supported for interface with PSI versions 11.4 through 11.7. Prior versions of Passport are no longer supported.

Software Installation

- Log in as the network supervisor.
- If you are downloading from the web:
  - Download the proper installation module for 8.5 by using the link sent to you, or by going to http://www.rtmcs.com/downloads.htm#Focus_Upgr and downloading the proper Focus demo system for your platform. Demonstration software will be activated by applying the registration key per the instructions sent with your key.
  - Locate the downloaded file, Focus85forPBSv11.exe on your local hard drive.
  - Begin the installation procedure by double clicking on the Focus85forPBSv11.exe file.
- If you are installing from a CD:
  - Insert the Focus 8.5 CD. The autorun menu should load. If the autorun menu does not load it can be started by invoking the autorun.exe file on the CD.
  - Choose Focus Service Manager from the main menu.
  - Choose Focus for Passport from the sub menu.
  - Choose the proper platform for your installation. There are significant differences between versions, it is very important that you install the proper version.
- Follow the screen instructions for the installation of the Focus 8.5 program files. Be sure to answer 'yes to all' if asked to overwrite program files during the installation.
- After the program files are installed, an options menu will appear. This will allow the installation of demo data and/or the initialization of empty files for new companies. For new Focus installations, choose 'Install empty data files'. For demo installs, choose 'Install demo data'. Click the 'Finish' button to complete the installation procedure.
- Registration of Focus is required to activate version 8.5. If registration is not performed, the software will be in demo mode.
- To register: Copy the supplied registration file into the <PassportTopLevel>\SVOBJ subdirectory.

Installation of FOCUS is now complete. Remember that the SVC control information must be entered before setup and processing can be done.

FOCUS Update Installation Instructions for Windows

Please read this entire document carefully before beginning the installation. Focus version 8.5 is supported for interface with PSI versions 11.4 through 11.5. Prior versions of Passport are no longer supported. Some of the instructions in this document refer to the version of Focus you are running before this upgrade. To determine your current version of Focus, go into Focus/Control Information from the Focus menu. The current Focus version information is displayed on the top line of this screen.

PRE-INSTALLATION STEPS

If you are upgrading the Passport version along with the Focus update

Install the new Passport software per Passport's instructions before you install Focus. Focus 8.5 should be installed into the most current Passport system. If the old and new Passport systems are in different directories, the Focus data files (SV00 directory) will need to be copied to the new Passport directory. If you need to export files in the pre-installation steps of Focus, the export needs to take place in the OLD Passport system. Be sure to copy the exported files from the old system to the new Passport directory as well.

If you are installing the 8.5 release as an upgrade to Focus version 6.8.0A and earlier

You must be on Focus version 6.9 or higher to directly upgrade to version 8.4 of Focus.
Contact RTM at 410-335-8350 to obtain instructions regarding the procedure for upgrading from versions prior to 6.9.

If you are installing the 8.5 release as an upgrade to any Focus version from 6.9 to 8.1

Perform only the following steps necessary for your installation, based on the version of Focus that was installed at your site prior to this upgrade.

If you are installing this software as an upgrade to:

- Focus version 6.9.0, 7.0, 7.1, or 8.0 – Perform P*rocedures A, B, C,* and *D*
- Focus version 8.1 – Perform *Procedures B, C, and D*
- Focus version 8.2 or 8.3 – Perform both *Procedure C and Procedure D*
- Focus version 8.4 – Perform only *procedure D*

Procedure A

The format of the contract and call notes file, the customer equipment file, and the contract billing detail file has changed in this release. Because of this, **you must perform the following steps before installing this update**.

- Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.
- Run the Focus file utilities. These can be found under the menu selection *Focus service / File utilities / File maintenance*. The file utilities menu will be displayed.
- From the file utilities menu, choose #1 - *Export a file*
- From the list of files displayed, the following files must be exported: *Customer equipment file* (# 3), *Contract/Call note file* (# 9), and *Contract billing detail* (# 14),
- Use the *(C) Create a new file* option. When prompted for the starting and ending file key, press *F1*, for "first" and "last".
- After the export function is complete, use the ESC key to return to the file selection screen.
- Repeat the above steps until all three files have been exported.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure B

The format of the service call file and the service call history file has changed in this release. Because of this, **you must perform the following steps before installing this update**.

- Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.

- Run the Focus file utilities. These can be found under the menu selection *Focus service / File utilities / File maintenance*. The file utilities menu will be displayed.
- From the file utilities menu, choose #1 - *Export a file*
- From the list of files displayed, the following files must be exported: *Service call file* (# 5), and *Service call history* (# 15)
- Use the *(C) Create a new file* option. When prompted for the starting and ending file key, press *F1*, for "first" and "last".
- After the export function is complete, use the ESC key to return to the file selection screen.
- Repeat the above steps until both of these files have been exported.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure C

The format of the service codes file has changed in this release. Because of this, **you must perform the following steps before installing this update**.

- Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.
- Run the Focus file utilities. These can be found under the menu selection *Focus service / File utilities / File maintenance*. The file utilities menu will be displayed.
- From the file utilities menu, choose #1 - *Export a file*
- From the list of files displayed, the following file must be exported: *Service codes* (# 1)
- Use the *(C) Create a new file* option. When prompted for the starting and ending file key, press *F1*, for "first" and "last".
- After the export function is complete, use the ESC key to return to the file selection screen.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure D

The format of the contract billing history file and the Focus control file has changed in this release. Because of this, **you must perform the following steps before installing this update**.

- Invoke the Passport software. Log in as a user that will have access to the Focus control file maintenance and file utilities.
- Go into Focus control file maintenance. This can be found under *Focus Service / Control information.*
- Capture and/or print out each page of Focus control info. This must be used to re-enter control information in the new version after installation. All five screens should be captured.
- Run the Focus file utilities. These can be found under the menu selection *Focus service / File utilities / File maintenance*. The file utilities menu will be displayed.
- From the file utilities menu, choose #2 - *Export a file*
- From the list of files displayed, the following file must be exported: *Contract billing hist* (# 13)
- Use the *(C) Create a new file* option. When prompted for the starting and ending file key, press *F1*, for "first" and "last".
- After the export function is complete, use the ESC key to return to the file selection screen.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

SOFTWARE INSTALLATION

All versions - install the update

- Log in as the as the network supervisor.
- If you are downloading from the web:

- o Download the proper installation module for 8.5 by using the link sent to you, or by going to http://www.rtmcs.com/downloads and downloading the proper Focus demo system for your platform. Demonstration software will be activated by applying the registration key per the instructions sent with your key.
  - o Locate the downloaded file, Focus85forPBSv11.exe on your local hard drive.
  - o Begin the installation procedure by double clicking on the Focus85forPBSv11.exe file.
- If you are installing from a CD:
  - o Insert the Focus 8.5 CD. The autorun menu should load. If the autorun menu does not load it can be started by invoking the autorun.exe file on the CD.
  - o Choose Focus Service Manager from the main menu.
  - o Choose Focus for Passport from the sub menu.
  - o Choose the proper platform for your installation. There are significant differences between versions, it is very important that you install the proper version.
- Follow the screen instructions for the installation of the Focus 8.5 program files. If you are installing this over a previous version of Focus, be sure to answer 'yes to all' when asked to overwrite program files during the installation.
- After the program files are installed, an options menu will appear. This will allow the installation of demo data and/or the initialization of empty files for new companies. If you are performing an upgrade of an existing Focus system, you may click the 'Finish' button to complete the installation procedure.
- Registration of Focus is required to activate version 8.5. If registration is not performed, the software will be in demo mode.
- To register: From the top level Passport directory, invoke the program **Focusreg.exe**.
- Enter the data from the registration form enclosed with the software CD and click the OK button to register. **It is very important that the data is keyed EXACTLY as it is printed on the form**. Incorrect registration of the software will cause it to revert to demo mode.

POST-INSTALLATION STEPS

Upgrade data files, if necessary

Perform only the following steps necessary for your installation, based on the version of Focus that was installed at your site prior to this upgrade.

If you are installing this software as an upgrade to:

- Focus version 6.9.0, 7.0, 7.1, or 8.0 – Perform *Procedures A*, *B, C, and D*
- Focus version 8.1 – Perform *Procedures B, C, and D*
- Focus version 8.2 or 8.3 – Perform only *Procedures B and D*
- Focus version 8.2 or 8.3 – Perform only *Procedure D*

Procedure A

Upgrade the files exported in the pre-installation procedure using the following steps.

- Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.
- Run the Focus 8.5 upgrade file utilities. These can be found under the menu selection *Focus service / File utilities / Upgrade from v7.1*.
- From the list of files displayed, restore each one by selecting the corresponding number next to the file name.
- After the restore function is complete, use the ESC key to return to the file selection screen.
- Repeat the restore steps until all three files have been upgraded.

Note: If any of the files are empty, you will need to initialize the empty file using the 8.5 file initialization to create proper data file formats.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure B

Upgrade the service codes file exported in the pre-installation procedure using the following steps.

- Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.
- Run the Focus 8.5 file initialization utility. These can be found under the menu selection *Focus service / File utilities / File Initialization*. A screen will be displayed, listing the Focus files available for initialization.
- Press enter, answering "No" for every file EXCEPT #2, *Service codes file*. Answer "Y" for this file only. When the screen is complete, all files should say "Skipped" except for the service codes file.
- At the "Field number to change?" prompt, press enter to initialize the codes file.
- After the initialization function is complete, you will be returned to the Focus menu.
- Run the Focus file utilities. These can be found under the menu selection *Focus service / File utilities / File maintenance*. The file utilities menu will be displayed.
- Select #2, *Restore from an export file*. A screen will be displayed, listing the Focus files available for restoration.
- From the list of files displayed, the following file must be restored: *Service codes file* (# 1)
- Answer "No" to "Any change?", then use the *(C)* option to Create a new data file. Answer "Yes" to "Are you sure" when prompted.
- After the restore function is complete, use the ESC key to return to the file selection screen. Continue using ESC to completely exit the Focus file utilities.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure C

Upgrade the service call and service call history files exported in the pre-installation procedure using the following steps.

- Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.
- ***Create Focus pay codes***. Before procedure C can be run, Focus pay codes must be defined in Focus setup. To define pay codes, follow the steps below.
  o Go to Setup/Pay Codes to enter the type of payments you will receive through service calls. (Note: running other Focus menu selections before completing the upgrade may result a "file definition conflict" message.)
  o You must define at least two pay codes before the remaining steps of procedure C can be done; one for Cash payments, and one for payments received by Check. For example, code=CASH, description=Cash, no validation, and code=CHK, description=Check, validation-1="DL #".
  o Other codes can be entered, if desired, up to a maximum of 8 different payment types. For example, code=MC, desc=MasterCard, Val-1=Card #, Val-2=Exp Date.
- Once a cash and check pay code have been defined in Focus, proceed with the remaining steps to complete the upgrade.
- Run the Focus 8.2 upgrade file utilities. These can be found under the menu selection *Focus service / File utilities / Upgrade from v8.1*. A screen will appear describing the utility. Press *Enter* to continue.
- You will be prompted to select pay codes that represent "Cash" and "Check" types of payments. Select the appropriate codes, and then press *Enter* to continue.
- From the list of files displayed, restore each one by selecting the corresponding number next to the file name.

- After the restore function is complete, use the ESC key to return to the file selection screen.
- Repeat the restore steps until both files have been upgraded.

Note: If any of the files are empty, you will need to initialize the empty file using the 8.5 file initialization to create proper data file formats.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure D

Upgrade the Focus control information and contract billing history file exported in the pre-installation procedure using the following steps.

- Invoke the Passport software. Log in as a user that will have access to the Focus control information and file utilities.
- Run the standard Focus 8.5 file utilities. These can be found under the menu selection *Focus service / File utilities / File Maintenance*.
- Select #4, *Initialize files*. A screen will be displayed, listing the Focus files available for initialization.
- Press enter, answering "No" for every file EXCEPT #1, *SVC Control file,* and #14, *Contract billing history*. Answer "Yes" for these two files. When the screen is complete, all files should say "Skipped" except for numbers 1 and 14.
- At the "Field number to change?" prompt, press enter to initialize the files.
- After the initialization function is complete, you will be returned to service file utility selection screen.
- Select #3, *Restore from an export file*. A screen will be displayed, listing the Focus files available for restoration.
- From the list of files displayed, the following file must be restored: *Contract billing hist* (# 13)
- Answer "No" to "Any change?", and then use the *(C)* option to Create a new data file. Answer "Yes" to "Are you sure" when prompted.
- After the restore function is complete, use the ESC key to return to the file selection screen. Continue using ESC to completely exit the Focus file utilities.
- Control information must be re-entered, using the screens captured and/or printed in the pre-installation process.
- Go into Focus control file maintenance. This can be found under *Focus Service / Control information.*
- Enter the control information, using the screens captured and/or printed in the pre-installation process as a reference.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Installation of the FOCUS update is now complete. Please take a moment to review the release notes and become familiar with the new features. Please review the Control information settings to ensure all fields have been properly filled in for any new options.

FOCUS New Installation Instructions for UNIX/Linux

Please read this entire document carefully before beginning the installation. Focus version 8.4 is supported for interface with PSI versions 11.4 through 11.7. Prior versions of Passport are no longer supported.

Software Installation

- Log in as the user that you use to install your Passport software.

- If you are downloading from the web:
  - Download the proper installation module for 8.5 by using the link sent to you, or by going to http://www.rtmcs.com/downloads.htm#Focus_Upgr and downloading the proper Focus 8.5 upgrade module for your platform. Demonstration software will be activated by applying the registration key per the instructions sent with your key.
  - Copy the downloaded file, pbsfocus85.tar.gz into the top level directory of your Passport Linux system.
  - Make the top level Passport directory your current directory. Example: cd /pbs
  - Uncompress the setup files from the distribution using tar, gunzip, or the graphical file browser on your system. Example: tar –xvf pbsfocus85.tar.gz

- If you are installing from a CD:
  - Mount the Focus 8.5 CD on a standard mount point. Example: mount /dev/cd0 /mnt
  - Make the top level Passort directory your current directory. Example: cd /pbs
  - Copy the setup files from the Focus CD using the following command.
    Example: cp /mnt/SOFTWARE/UNIX/pbsfocus85.tar.gz **.**/pbsfocus85.tar.gz
    Note: This command assumes the mount point for the CD is "/mnt", and is case-sensitive.
  - Uncompress the setup files from the distribution using tar, gunzip, or the graphical file browser on your system. Example: tar –xvf pbsfocus85.tar.gz

- From the Passport top-level directory, invoke the FOCUS installation routine by typing sh finstall.sh. During this procedure, program files will be unpacked and an empty set of FOCUS data files will be created, if necessary. You will be asked to provide a company ID for the company into which the FOCUS data files will be installed.

- Registration of Focus is required to activate version 8.5. If registration is not performed, the software will be in demo mode. To register, copy the supplied registration program into the <Passport>/SVOBJ subdirectory.

Installation of FOCUS is now complete. Remember that the SVC control information must be entered before setup and processing can be done.

FOCUS Update Installation Instructions for UNIX/Linux

Please read this entire document carefully before beginning the installation. Focus version 8.5 is supported for interface with PSI versions 11.4 through 11.7. Prior versions of Passport are no longer supported. Some of the instructions in this document refer to the version of Focus you are running before this upgrade. To determine your current version of Focus, go into Focus/Control Information from the Focus menu. The current Focus version information is displayed on the top line of this screen.

PRE-INSTALLATION STEPS

If you are upgrading the Passport version along with the Focus update

Install the new Passport software per Passport's instructions before you install Focus. Focus 8.5 should be installed into the most current Passport system. If the old and new Passport systems are in different directories, the Focus data files (SV00 directory) will need to be copied to the new Passport directory. If you need to export files in the pre-installation steps of Focus, the export needs to take place in the OLD Passport system. Be sure to copy the exported files from the old system to the new Passport directory as well.

If you are installing the 8.5 release as an upgrade to Focus version 6.8.0A and earlier

You must be on Focus version 6.9 or higher to directly upgrade to version 8.5 of Focus.
Contact RTM at 410-335-8350 to obtain instructions regarding the procedure for upgrading from versions prior to 6.9.

If you are installing the 8.5 release as an upgrade to any Focus version from 6.9 to 8.1

Perform only the following steps necessary for your installation, based on the version of Focus that was installed at your site prior to this upgrade.

If you are installing this software as an upgrade to:

- Focus version 6.9.0, 7.0, 7.1, or 8.0 – Perform *Procedures A, B, C, D*
- Focus version 8.1 – Perform both *Procedures B, C, and D*
- Focus version 8.2 or 8.3 – Perform *Procedures C and D*
- Focus version 8.4 – Perform only *Procedure D*

Procedure A

The format of the contract and call notes file, the customer equipment file, and the contract billing detail file has changed in this release. Because of this, **you must perform the following steps <u>before</u> installing this update**.

- Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.
- Run the Focus file utilities. These can be found under the menu selection *Focus service / File utilities / File maintenance*. The file utilities menu will be displayed.
- From the file utilities menu, choose #1 - *Export a file*
- From the list of files displayed, the following files must be exported: *Customer equipment file* (# 3), *Contract/Call note file* (# 9), and *Contract billing detail* (# 14),
- Use the *(C) Create a new file* option. When prompted for the starting and ending file key, press *F1*, for "first" and "last".
- After the export function is complete, use the ESC key to return to the file selection screen.
- Repeat the above steps until all three files have been exported.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure B

The format of the service call file and the service call history file has changed in this release. Because of this, **you must perform the following steps <u>before</u> installing this update**.

- Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.

- Run the Focus file utilities. These can be found under the menu selection *Focus service / File utilities / File maintenance*. The file utilities menu will be displayed.

- From the file utilities menu, choose #1 - *Export a file*

- From the list of files displayed, the following files must be exported: *Service call file* (# 5), and *Service call history* (# 15)

- Use the *(C) Create a new file* option. When prompted for the starting and ending file key, press *F1*, for "first" and "last".

- After the export function is complete, use the ESC key to return to the file selection screen.

- Repeat the above steps until both of these files have been exported.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure C

The format of the service codes file has changed in this release. Because of this, **you must perform the following steps before installing this update**.

- Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.

- Run the Focus file utilities. These can be found under the menu selection *Focus service / File utilities / File maintenance*. The file utilities menu will be displayed.

- From the file utilities menu, choose #1 - *Export a file*

- From the list of files displayed, the following file must be exported: *Service codes* (# 1)

- Use the *(C) Create a new file* option. When prompted for the starting and ending file key, press *F1*, for "first" and "last".

- After the export function is complete, use the ESC key to return to the file selection screen.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure D

The format of the contract billing history file and the Focus control file has changed in this release. Because of this, **you must perform the following steps before installing this update**.

- Invoke the Passport software. Log in as a user that will have access to the Focus control file maintenance and file utilities.

- Go into Focus control file maintenance. This can be found under *Focus Service / Control information.*

- Capture and/or print out each page of Focus control info. This must be used to re-enter control information in the new version after installation. All five screens should be captured.

- Run the Focus file utilities. These can be found under the menu selection *Focus service / File utilities / File maintenance*. The file utilities menu will be displayed.

- From the file utilities menu, choose #2 - *Export a file*

- From the list of files displayed, the following file must be exported: *Contract billing hist* (# 13)

- Use the *(C) Create a new file* option. When prompted for the starting and ending file key, press *F1*, for "first" and "last".

- After the export function is complete, use the ESC key to return to the file selection screen.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

SOFTWARE INSTALLATION

All versions - install the update

- Log in as the as the user you use to install your Passport software.

- If you are downloading from the web:

- o Download the proper installation module for 8.5 by using the link sent to you, or by going to http://www.rtmcs.com/downloads.htm#Focus_Upgr and downloading the proper Focus 8.5 upgrade module for your platform. Demonstration software will be activated by applying the registration key per the instructions sent with your key.
  - o Copy the downloaded file, pbsfocus85.tar.gz into the top level directory of your Passport Linux system.
  - o Make the top level Passport directory your current directory. Example: cd /pbs
  - o Uncompress the setup files from the distribution using tar, gunzip, or the graphical file browser on your system. Example: tar –xvf pbsfocus85.tar.gz
- • If you are installing from a CD:
  - o Mount the Focus 8.5 CD on a standard mount point. Example: mount /dev/cd0 /mnt
  - o Make the top level Passort directory your current directory. Example: cd /pbs
  - o Copy the setup files from the Focus CD using the following command.
    Example: cp /mnt/SOFTWARE/UNIX/pbsfocus85.tar.gz **.**/pbsfocus85.tar.gz
    Note: This command assumes the mount point for the CD is "/mnt", and is case-sensitive.
  - o Uncompress the setup files from the distribution using tar, gunzip, or the graphical file browser on your system. Example: tar –xvf pbsfocus85.tar.gz

- • From the Passport top-level directory, invoke the FOCUS installation routine by typing sh finstall.sh. During this procedure, program files will be unpacked and an empty set of FOCUS data files will be created, if necessary. You will be asked to provide a company ID for the company into which the FOCUS data files will be installed.

- • Registration of Focus is required to activate version 8.4. If registration is not performed, the software will be in demo mode. To register, copy the supplied registration file into the <PassportTopLevel>\SVOBJ subdirectory.

POST-INSTALLATION STEPS

Upgrade data files, if necessary

Perform only the following steps necessary for your installation, based on the version of Focus that was installed at your site prior to this upgrade.

If you are installing this software as an upgrade to:

- • Focus version 6.9.0, 7.0, 7.1, or 8.0 – Perform *Procedures A*, *B*, C, and *Procedure D*
- • Focus version 8.1 – Perform *Procedures B, C, and D*
- • Focus version 8.2 or 8.3 – Perform *Procedures B and D*
- • Focus version 8.4 – Perform only *Procedure D*

Procedure A

Upgrade the files exported in the pre-installation procedure using the following steps.

- • Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.
- • Run the Focus 8.5 upgrade file utilities. These can be found under the menu selection *Focus service / File utilities / Upgrade from v7.1*.
- • From the list of files displayed, restore each one by selecting the corresponding number next to the file name.
- • After the restore function is complete, use the ESC key to return to the file selection screen.
- • Repeat the restore steps until all three files have been upgraded.

Note: If any of the files are empty, you will need to initialize the empty file using the 8.5 file initialization to create proper data file formats.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure B

Upgrade the service codes file exported in the pre-installation procedure using the following steps.

- Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.

- Run the Focus 8.5 file initialization utility. These can be found under the menu selection *Focus service / File utilities / File Initialization*. A screen will be displayed, listing the Focus files available for initialization.

- Press enter, answering "No" for every file EXCEPT #2, *Service codes file*. Answer "Y" for this file only. When the screen is complete, all files should say "Skipped" except for the service codes file.

- At the "Field number to change?" prompt, press enter to initialize the codes file.

- After the initialization function is complete, you will be returned to the Focus menu.

- Run the Focus file utilities. These can be found under the menu selection *Focus service / File utilities / File maintenance*. The file utilities menu will be displayed.

- Select #2, *Restore from an export file*. A screen will be displayed, listing the Focus files available for restoration.

- From the list of files displayed, the following file must be restored: *Service codes file* (# 1)

- Answer "No" to "Any change?", then use the *(C)* option to Create a new data file. Answer "Yes" to "Are you sure" when prompted.

- After the restore function is complete, use the ESC key to return to the file selection screen. Continue using ESC to completely exit the Focus file utilities.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure C

Upgrade the service call and service call history files exported in the pre-installation procedure using the following steps.

- Invoke the Passport software. Log in as a user that will have access to the Focus file utilities.

- ***Create Focus pay codes***.   Before procedure C can be run, Focus pay codes must be defined in Focus setup. To define pay codes, follow the steps below.
  - Go to Setup/Pay Codes to enter the type of payments you will receive through service calls. (Note: running other Focus menu selections before completing the upgrade may result a "file definition conflict" message.)
  - You must define at least two pay codes before the remaining steps of procedure C can be done; one for Cash payments, and one for payments received by Check. For example, code=CASH, description=Cash, no validation, and code=CHK, description=Check, validation-1="DL #".
  - Other codes can be entered, if desired, up to a maximum of 8 different payment types. For example, code=MC, desc=MasterCard, Val-1=Card #, Val-2=Exp Date.

- Once a cash and check pay code have been defined in Focus, proceed with the remaining steps to complete the upgrade.

- Run the Focus 8.5 upgrade file utilities. These can be found under the menu selection *Focus service / File utilities / Upgrade from v8.1*. A screen will appear describing the utility. Press *Enter* to continue.

- You will be prompted to select pay codes that represent "Cash" and "Check" types of payments. Select the appropriate codes, and then press *Enter* to continue.

- From the list of files displayed, restore each one by selecting the corresponding number next to the file name.

- After the restore function is complete, use the ESC key to return to the file selection screen.
- Repeat the restore steps until both files have been upgraded.

Note: If any of the files are empty, you will need to initialize the empty file using the 8.5 file initialization to create proper data file formats.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Procedure D

Upgrade the Focus control information and contract billing history file exported in the pre-installation procedure using the following steps.

- Invoke the Passport software. Log in as a user that will have access to the Focus control information and file utilities.
- Run the standard Focus 8.5 file utilities. These can be found under the menu selection *Focus service / File utilities / File Maintenance*.
- Select #4, *Initialize files*. A screen will be displayed, listing the Focus files available for initialization.
- Press enter, answering "No" for every file EXCEPT #1, *SVC Control file,* and #14, *Contract billing history*. Answer "Yes" for these two files. When the screen is complete, all files should say "Skipped" except for numbers 1 and 14.
- At the "Field number to change?" prompt, press enter to initialize the files.
- After the initialization function is complete, you will be returned to service file utility selection screen.
- Select #3, *Restore from an export file*. A screen will be displayed, listing the Focus files available for restoration.
- From the list of files displayed, the following file must be restored: *Contract billing hist* (# 13)
- Answer "No" to "Any change?", and then use the *(C)* option to Create a new data file. Answer "Yes" to "Are you sure" when prompted.
- After the restore function is complete, use the ESC key to return to the file selection screen. Continue using ESC to completely exit the Focus file utilities.
- Control information must be re-entered, using the screens captured and/or printed in the pre-installation process.
- Go into Focus control file maintenance. This can be found under *Focus Service / Control information*.
- Enter the control information, using the screens captured and/or printed in the pre-installation process as a reference.

In a multiple company setup, this procedure must be followed for each company that runs Focus.

Installation of the FOCUS update is now complete. Please take a moment to review the release notes and become familiar with the new features. Please review the Control information settings to ensure all fields have been properly filled in for any new options.