
FOCUS Service Management Software

Version 8.4 for CounterPoint

Installation Instructions

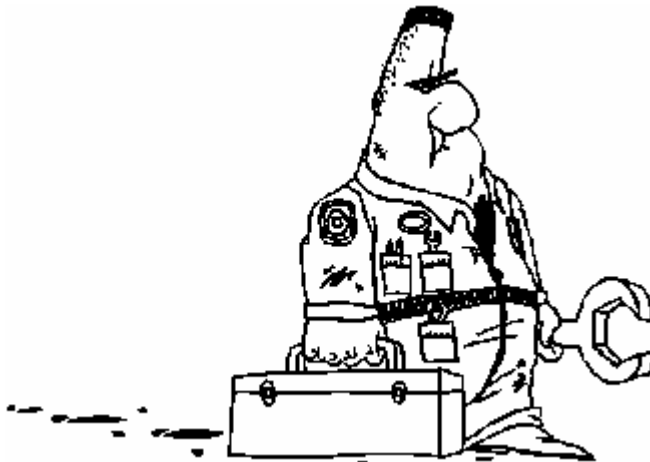
Thank you for purchasing Focus Service Management Software from RTM Computer Solutions. This booklet of installation instructions will help get you up and running with Focus. Should you have any problems or questions concerning the software, technical assistance is available by contacting your dealer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

UNIX/Linux systems

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



FOCUS New Installation Instructions for Windows

Please read this entire document carefully before beginning the installation. Focus version 8.4 is supported for interface with CounterPoint versions 7.5. Prior versions of CounterPoint 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 8.4 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.
 - Located the downloaded file, Focus84forCP75.exe on your local hard drive.
 - Begin the installation procedure by double clicking on the Focus84forCP75.exe file.
- If you are installing from a CD:
 - Insert the Focus 8.4 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 CounterPoint 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 8.4 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 8.4. If registration is not performed, the software will be in demo mode.
- To register: From the top level CounterPoint 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.

Note:

The installation program may have offered to make the following change automatically. If you chose to make the change manually, you must perform the following procedure.

Edit the SYN RUN.SYN File

- From the top level CounterPoint directory, type: edit synrun.syn
- Add the following line, if it does not already exist (All caps, no spaces)
COBSW= -F

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 8.4 is supported for interface with CounterPoint versions 7.5. Prior versions of CounterPoint 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 CounterPoint version along with the Focus update

Install the new CounterPoint per Synchronics' instructions before you install Focus. Focus 8.4 should be installed into the most current CounterPoint system. If the old and new CounterPoint systems are in different directories, the Focus data files (SVDATA directory) will need to be copied to the new CounterPoint company data directory. If you need to export files in the pre-installation steps of Focus, the export needs to take place in the OLD CounterPoint system. Be sure to copy the export directory from the old system to the new CounterPoint directory as well.

If you are installing the 8.4 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 8.4 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 *Procedure A*, *Procedure B* and *Procedure C*
- Focus version 8.1 – Perform both *procedure B* and *Procedure C*
- Focus version 8.2 or 8.3 – Perform only *procedure C*

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 CounterPoint 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 #2 - *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 CounterPoint 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 #2 - *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 CounterPoint 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 #2 - *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.

SOFTWARE INSTALLATION

All versions - install the update

- Log in as the as the network supervisor.
- If you are downloading from the web:
 - Download the proper installation module for 8.4 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.
 - Located the downloaded file, *Focus84forCP75.exe* on your local hard drive.
 - Begin the installation procedure by double clicking on the *Focus84forCP75.exe* file.
- If you are installing from a CD:
 - Insert the Focus 8.4 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 CounterPoint 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 8.4 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 8.4. If registration is not performed, the software will be in demo mode.
- To register: From the top level CounterPoint 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.

Note:

The installation program may have offered to make the following change automatically. If you chose to make the change manually, you must perform the following procedure.

Edit the SYNRUN.SYN File

- From the top level CounterPoint directory, type: edit synrun.syn
- Add the following line, if it does not already exist (All caps, no spaces)
COBSW=-F

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 *Procedure A*, *Procedure B*, and *Procedure C*
- Focus version 8.1 – Perform both *Procedure B* and *Procedure C*
- Focus version 8.2 or 8.3 – Perform only *Procedure c*

Procedure A

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

- Go to a system command prompt and make the top level CounterPoint directory your current directory. Example: *cd \cpoint*
- From the CounterPoint top level directory, invoke the Focus version 8.1 upgrade utility by typing *focus81* followed by a space and the ID of the company to upgrade (for example: *focus81 DATAFILS*).
- 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 8.4 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 call and service call history files exported in the pre-installation procedure using the following steps.

- Invoke the CounterPoint software. Log in as a user that will have access to the Focus file utilities.
- Run the Focus 8.4 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 from CounterPoint that represent “Cash” and “Check” types of payments. Select the appropriate codes, and then press *Enter* to continue to the next screen.
- 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 8.4 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 C

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

- Invoke the CounterPoint software. Log in as a user that will have access to the Focus file utilities.
- Run the standard Focus 8.4 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 #2, *Service codes file*. 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 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: *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.

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 CounterPoint versions 7.5. Prior versions of CounterPoint are no longer supported.

Software Installation

- Log in as the user that you use to install your CounterPoint software.
- If you are downloading from the web:
 - Download the proper installation module for 8.4 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.
 - Copy the downloaded file, F840CP7.ZIP into the top level directory of your CP UNIX system.
 - Make the top level CounterPoint directory your current directory. Example: `cd /cpunix`
 - Unzip the setup files from the distribution using the following command: `unzip F840CP7.ZIP`
- If you are installing from a CD:
 - Mount the Focus 8.4 CD on a standard mount point. Example: `mount /dev/cd0 /mnt`
 - Make the top level CounterPoint directory your current directory. Example: `cd /cpunix`
 - Unzip the setup files from the Focus CD using the following command.
Example: `unzip /mnt/SOFTWARE/UNIX/F840CP7.ZIP`
Note: This command assumes the mount point for the CD is “/mnt”, and is case-sensitive.
- From the CounterPoint 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:
 - Go to a system command prompt and make the top level CounterPoint directory your current directory. Example: `cd /cpoint`
 - From the CounterPoint top level directory, invoke the Focus registration program by typing `focusreg`
 - Enter the data from the registration form enclosed with the software CD 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.

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 8.4 is supported for interface with CounterPoint version 7.5. Prior versions of CounterPoint 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 CounterPoint version along with the Focus update

Install the new CounterPoint per Synchronics' instructions before you install Focus. Focus 8.4 should be installed into the most current CounterPoint system. If the old and new CounterPoint systems are in different directories, the Focus data files (SVDATA directory) will need to be copied to the new CounterPoint company data directory. If you need to export files in the pre-installation steps of Focus, the export needs to take place in the OLD CounterPoint system. Be sure to copy the export directory from the old system to the new CounterPoint directory as well.

If you are installing the 8.4 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 8.4 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 Procedure A, Procedure B and Procedure C
- Focus version 8.1 – Perform both procedure B and Procedure C
- Focus version 8.2 or 8.3 – Perform only procedure C

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 CounterPoint 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 #2 - *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 CounterPoint 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 #2 - *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 CounterPoint 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 #2 - *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.

SOFTWARE INSTALLATION

All versions - install the update

- Log in as the user that you use to install your CounterPoint software.
- If you are downloading from the web:
 - Download the proper installation module for 8.4 by using the link sent to you, or by going to <http://www.rtms.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.
 - Copy the downloaded file, F840CP7.ZIP into the top level directory of your CP UNIX system.
 - Make the top level CounterPoint directory your current directory. Example: `cd /cpunix`
 - Unzip the setup files from the distribution using the following command: `unzip F840CP7.ZIP`
- If you are installing from a CD:
 - Mount the Focus 8.4 CD on a standard mount point. Example: `mount /dev/cd0 /mnt`
 - Make the top level CounterPoint directory your current directory. Example: `cd /cpunix`
 - Unzip the setup files from the Focus CD using the following command. Example: `unzip /mnt/SOFTWARE/UNIX/F840CP7.ZIP`

Note: This command assumes the mount point for the CD is “/mnt”, and is case-sensitive.

- From the CounterPoint 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.
- Go to a system command prompt and make the top level CounterPoint directory your current directory. Example: ***cd /cpoint***
- From the CounterPoint top level directory, invoke the Focus registration by typing ***focusreg***
- Enter the data from the registration form enclosed with the software CD 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 Procedure A, Procedure B, and Procedure C
- Focus version 8.1 – Perform both Procedure B and Procedure C
- Focus version 8.2 or 8.3 – Perform only Procedure c

Procedure A

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

- Go to a system command prompt and make the top level CounterPoint directory your current directory. Example: ***cd /cpoint***
- From the CounterPoint top level directory, invoke the Focus version 8.0 upgrade utility by typing ***focus81*** followed by a space and the ID of the company to upgrade (for example: ***focus81 DATAFILS***).
- From the list of files displayed, restore each one by selecting the corresponding number next to the file name.
- After the restore 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 8.4 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 call and service call history files exported in the pre-installation procedure using the following steps.

- Invoke the CounterPoint software. Log in as a user that will have access to the Focus file utilities.
- Run the Focus 8.4 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 from CounterPoint that represent “Cash” and “Check” types of payments. Select the appropriate codes, and then press *Enter* to continue to the next screen.

- 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 8.4 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 C

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

- Invoke the CounterPoint software. Log in as a user that will have access to the Focus file utilities.
- Run the standard Focus 8.4 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 #2, Service codes file. 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 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: 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.

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.