

AIM

Installation & Quick Start Guide

Version 12.0



RETAIL SOFTWARE SOLUTION

Document overview

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

What is AIM?

AIM is a completely integrated point of sale and business software solution for retail stores. AIM 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 AIM modules

AIM is a module-based point of sale 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. 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 (AP), general ledger (GL), purchase orders (PO), lesson/appointment scheduling and billing, repair and service tracking, and long-term rental and sales contracts.

Maintenance Plans

Platinum, Gold, and Silver Maintenance Plans are available for purchase. Our Maintenance Plans grant you varying access to Tri-Tech's resources such as live technical support meetings through Microsoft Teams, free product upgrades and updates, Tri-Tech's [Member Portal](#), training videos and livestreams, and the Tri-Tech Forums. Contact your Tri-Tech Sales representative for more information.

Benefiting from Active-e

Active-e extends AIM to the outside world, including websites, mobile applications and 3rd party developers. With Active-e you can provide your customers options to make payments, view account history, schedule lessons, rent inventory, receive mobile notifications (such as event reminders). You can also integrate with e-commerce, connect with suppliers to check availability and pricing.

Contacting Tri-Tech

Office hours

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

Extended support hours are available for customers with Platinum or Gold Maintenance Plans and are weekdays until 8:00 P.M. Central Time and Saturdays from 9:00 A.M. to 4:00 P.M. Central Time. A \$10.00 per-call fee is charged for any call outside our standard office hours (M-F 8a-5p).

Learn more about our Maintenance Plan options [here](#).

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:	www.tritechretail.com
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Sales and Administration

by phone:	(563) 556-3556, ext. 1
by email:	sales@tritechretail.com

Training

by phone:	(563) 556-3556, ext. 118
by email:	training@tritechretail.com

Technical Support

by phone:	(563) 556-3556, ext. 2 You will be prompted for your support access code; find this code in the Welcome email you receive from us.
request a meeting:	Go to Help > Request Meeting with Tech to schedule a meeting with a Support Technician or request a callback ASAP via Microsoft Teams from a qualified Support Technician.

Need help installing?

by phone:	(563) 556-3556, ext. 2 You will be prompted for your support access code; find this code in the Welcome email you receive from us.
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Additional options for finding the help you need

The Help menu inside AIM

Stuck? Consider [The Help menu](#) your first line of defense. From here you can access a number of different options depending on your maintenance plan level.

- View online user documentation, or help. Available to all customers. You can also enter the following address into a web browser:
www.tritechretail.com/download/AIMHelp12/index.html.
- Review software changes to the current or previous versions of AIM and AIM Mobile. Available to all customers.
- Begin a phone call with Tri-Tech Support. Available as pay-per-instance or to customers with a Silver, Gold, or Platinum maintenance plan.
- Search your AIM support cases. View any of your cases or create a new case for Tri-Tech Support. Available to customers with Silver, Gold, or Platinum maintenance plans.
- View Tri-Tech's online training videos and livestreams. View all Tri-Tech University videos and join Professor Tri-Tech's livestreams. Available to customers with Silver, Gold, or Platinum maintenance plans. Visit www.tritechretail.com/t-training.aspx for more information on our training options.
- Request a Microsoft Teams meeting. Schedule a meeting with your favorite Support Technician or request a callback. Available to customers with Gold or Platinum maintenance plans.
- Access the AIM forums. Share ideas and ask questions of other like-minded businesses. Available to customers with a Platinum maintenance plan.

Member Portal, available to customers with Maintenance Plans

Go to the [Member Portal](http://www.tritechretail.com/t-memberportal.aspx) (www.tritechretail.com/t-memberportal.aspx) to take advantage of these features:

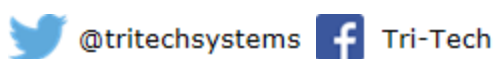
- A Member Services area with access to the AIM Forums,* software updates and downloads, logging and reviewing support requests,* and consultation requests for web design.
- An Account Services area with access to your stored credit card information, account payments and history, your web orders, and your maintenance plans.
- A Training Services area where you can view videos and live streams* or sign up for training.
- An After Hours area where you can report that AIM is down or not functioning as expected outside of our normal business hours.

For more detailed descriptions about the options available on Member Portal, refer to [Member Portal options](#) on page 61.

* This option is also available directly from AIM by accessing the Help menu, as described above.

Social media

Follow Tri-Tech and get valuable tips and advice.



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Program to Succeed

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

Installation - your way

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

Are you ready to install now? Please do not hesitate to give our team a call and start the install process. For more information, refer to [Contacting Tri-Tech](#) on page iii.

Your Support Technician 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 consultation call. During this call the Support Technician will install AIM and set up the necessary maintenance requirements based on your individual business needs. If you have already completed these steps, the Support Technician will go through the setup and verify that everything looks correct. We recommend familiarizing yourself with AIM for several days after your setup prior to taking training.
- Make sure you receive the training you need. Familiarizing yourself with AIM allows you to have the most successful training experience with in-depth questions about your specific business needs.

Allow remote access to your computer (TeamViewer)

Follow the steps below to download TeamViewer. TeamViewer allows Tri-Tech Support Technicians to access your computer during your install consultation and any future support phone calls. You will need to complete these steps each time your Support Technician requests access to your computer with TeamViewer.

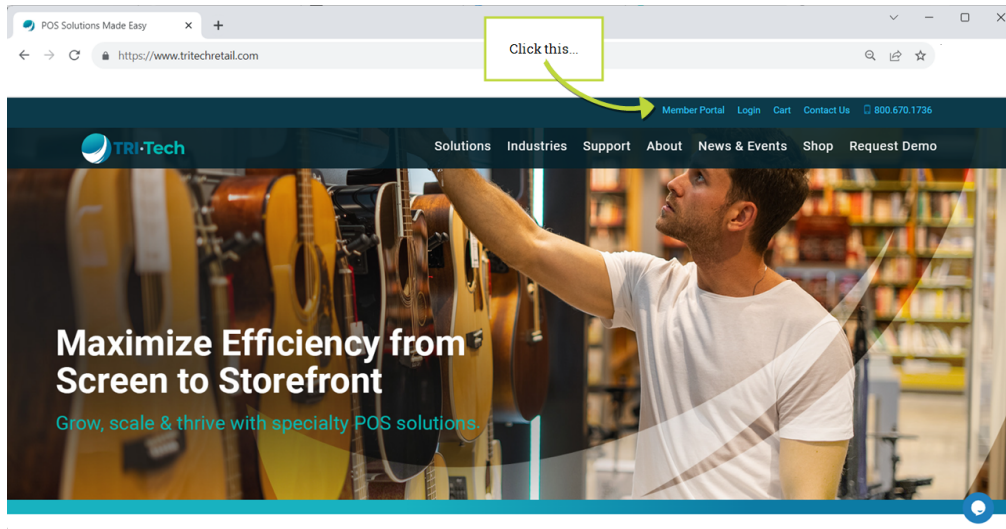


Tri-Tech Support Technicians only have access to your computer when you allow it. Once the connection is closed we cannot access your computer again until you grant access.

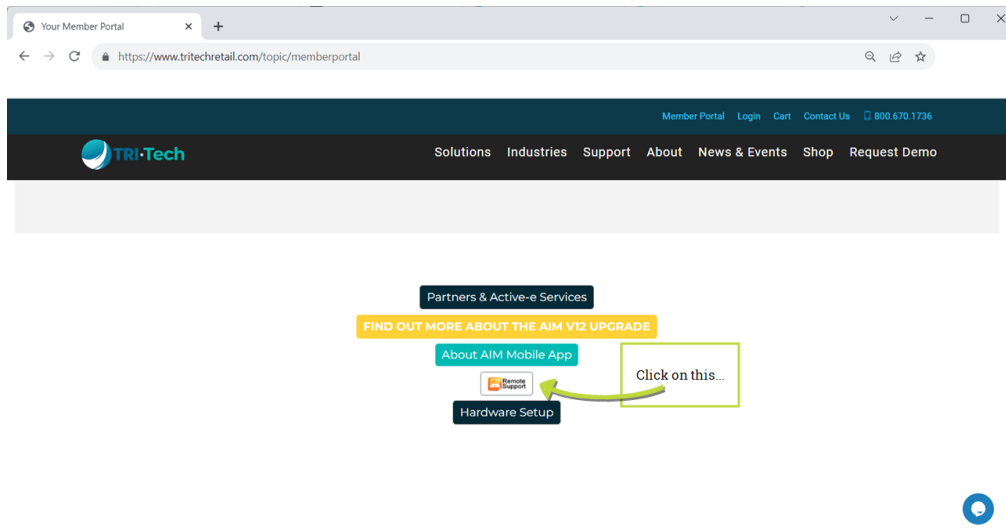
Steps to complete

Prerequisites: You must have an Internet connection to download TeamViewer.

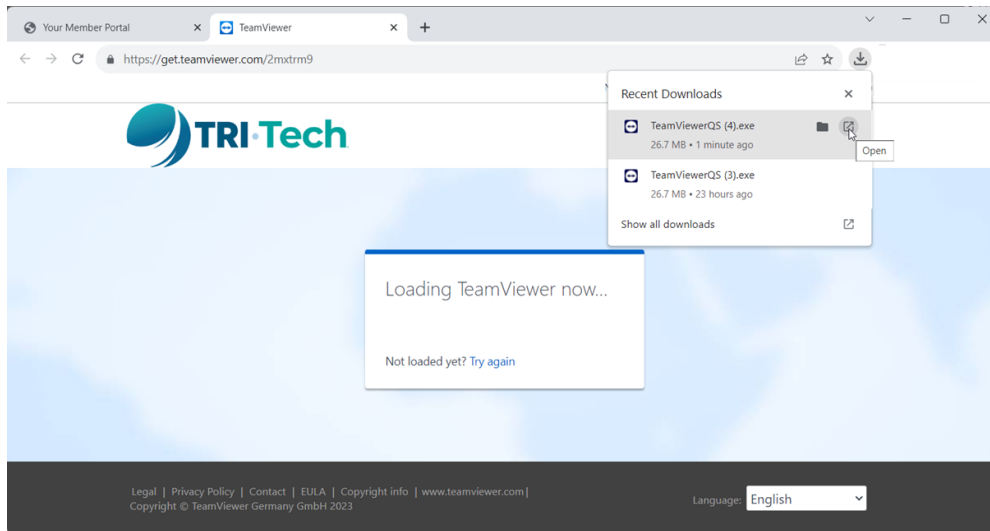
1. In the Internet browser of your choice, go to the Tri-Tech website (www.tritechretail.com).
2. Click the Member Portal link at the top.



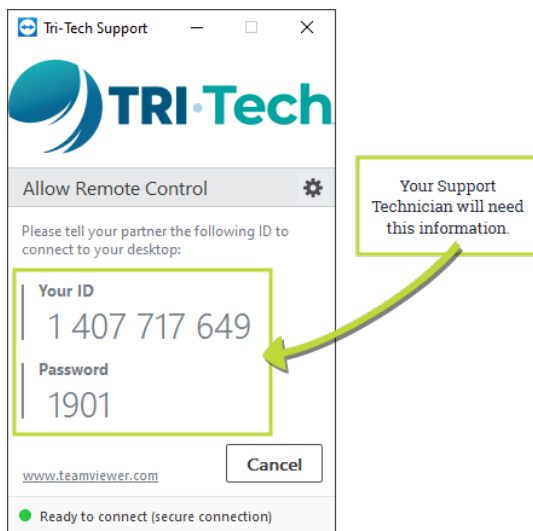
3. Click the icon for Remote Support.



4. TeamViewer automatically downloads to your computer. Once the download is complete, click the arrow and select **Open**.



5. A message displays asking if you want to allow the app to make changes to your device. Click **Yes**. The Tri-Tech Support window opens.
6. Provide your ID and password to your Support Technician to grant access to your computer. They will be able to control your mouse cursor and any programs.
7. Once you're done sharing your computer with your Support Technician, he or she will disconnect from your computer or you can click **Cancel**.





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

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

Please contact Tri-Tech Support if you have any questions about the installation process.

1. Complete the steps in [Set the environment variables](#) below for each workstation that will access AIM.
2. Complete the steps in [Install the server copy of AIM](#) on page 8. All new customers must complete these steps.
3. Complete the steps in [Access AIM from networked workstations](#) on page 26 to install a "local copy" of AIM on each workstation that will access it. These steps need to be completed on all workstations that will access AIM across a network.

Set the environment variables

Each workstation that will access the AIM data files must be set up with an environment variable. 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 AIM. Follow the steps below to create the environment variable on the workstations.



Did you know?

Do you need to access more than one copy of AIM from a single workstation? If so, you can assign multiple workstation numbers to a single environment variable. Each time you open a copy of AIM on that computer the next workstation number is automatically selected. For example, you set your environment variable value to **4,19,20**. The first time you open AIM on your computer it opens it for workstation #4. The next instance you open is for workstation #19, and the next for workstation #20. You will not be able to run more than 3 instances of AIM in this scenario. However, you can enter as many workstation numbers for a single environment variable as you have licenses for. It is also important to note that each workstation number can only be open on one computer at a time. In other words, if workstation #22 is open on computer A, it cannot also be opened on computer B.

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.

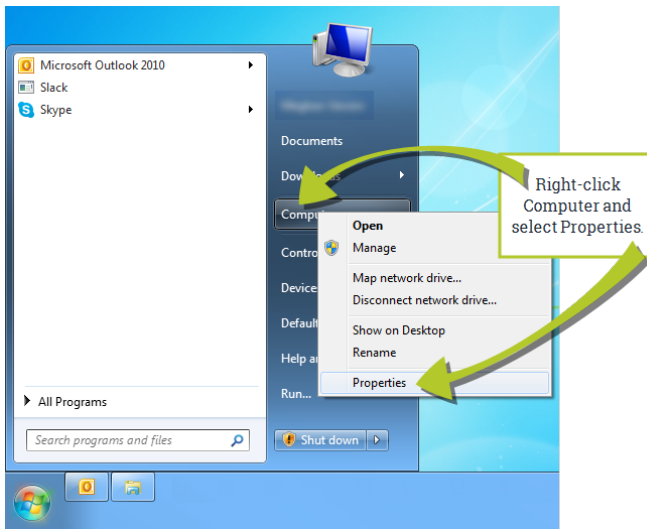


The images below were taken on a Windows 7 operating system. Depending on your operating system and setup, yours may look different.

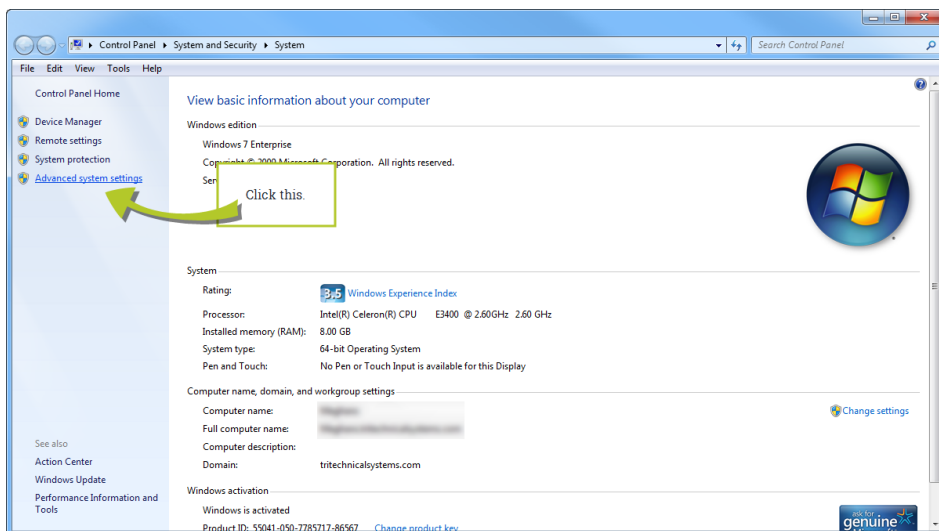
1. Close AIM if it is currently open.
2. Click to open the **Start** menu on your computer's desktop.



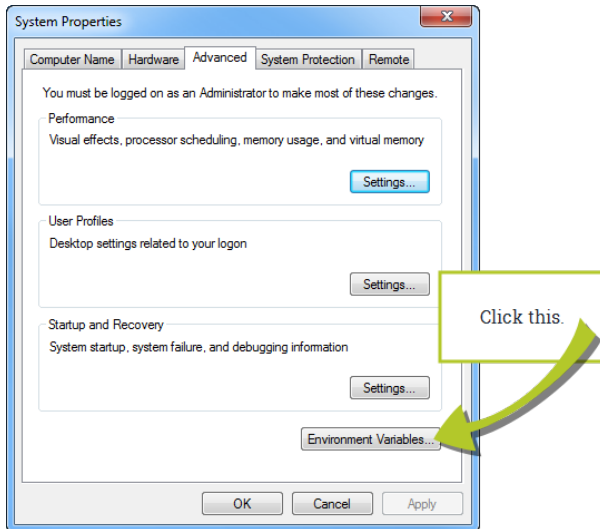
3. Right-click on **Computer** and click **Properties**.



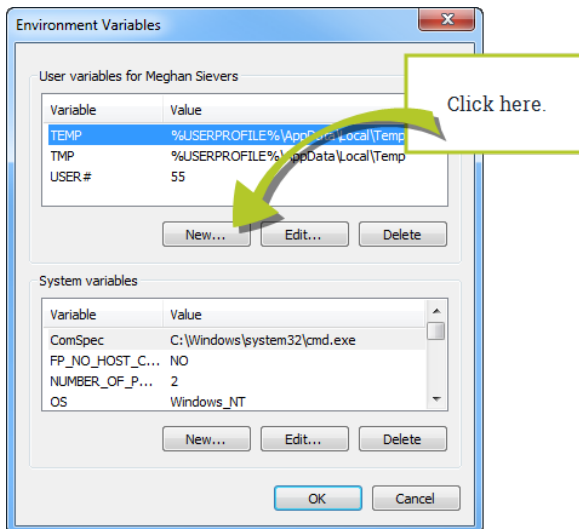
4. On the **System** window, click **Advanced system settings**. The **System Properties** window opens.



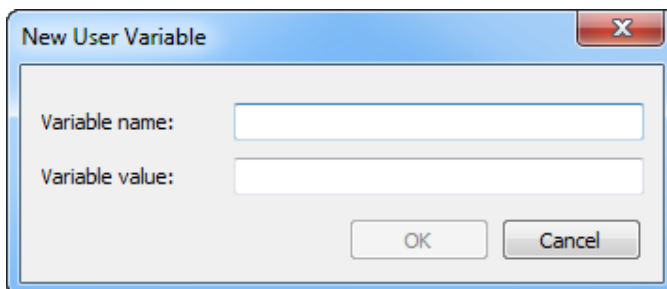
5. Click the **Advanced** tab.
6. Click **Environment Variables**. The **Environment Variables** window opens.



7. Click **New** in the **User Variables** section. The **New User Variable** window opens.



8. Type **User#** in the **Variable name** box and a unique workstation number in the **Variable value** box. Click **OK**. (Separate multiple workstation numbers with commas (,) but do not use spaces. For example, **4,19,20**.)



9. Repeat these steps for each workstation. Increment the workstation number by one (1) each time.
10. Continue to [Install the server copy of AIM](#) below.

Install the server copy of AIM

Follow the steps below to install AIM 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 AIM locally on this computer. For information about hardware and system requirements, refer to the Tri-Tech website (www.tritechretail.com/t-networkprep.aspx) or contact your Sales representative.

If at any point during the installation you have a question, don't hesitate to call our support team.



Give yourself plenty of time to complete this install and be patient while it's working. Tri-Tech recommends allowing at least 30 minutes to complete the steps in this procedure.

Before you begin

You must complete the steps in [Set the environment variables](#) on page 5 before you can complete these steps.

You must have an Internet connection to complete these steps.

Tri-Tech also recommends verifying that all current Windows updates have been installed on your computer.

How much disk space will you need?

You will need 95 - 100 MB of disk space to complete the installation, depending on the components you choose to install. You will need an additional 1GB of disk space to install Microsoft SQL Server as part of this process if it is not already installed. You can also optionally buy and install (before you begin the steps below) a version of SQL server to suit the needs of your store. If you are unsure if a different version of SQL would be appropriate for your business, contact Tri-Tech Support.

Guidelines for setting up inventory categories and subcategories

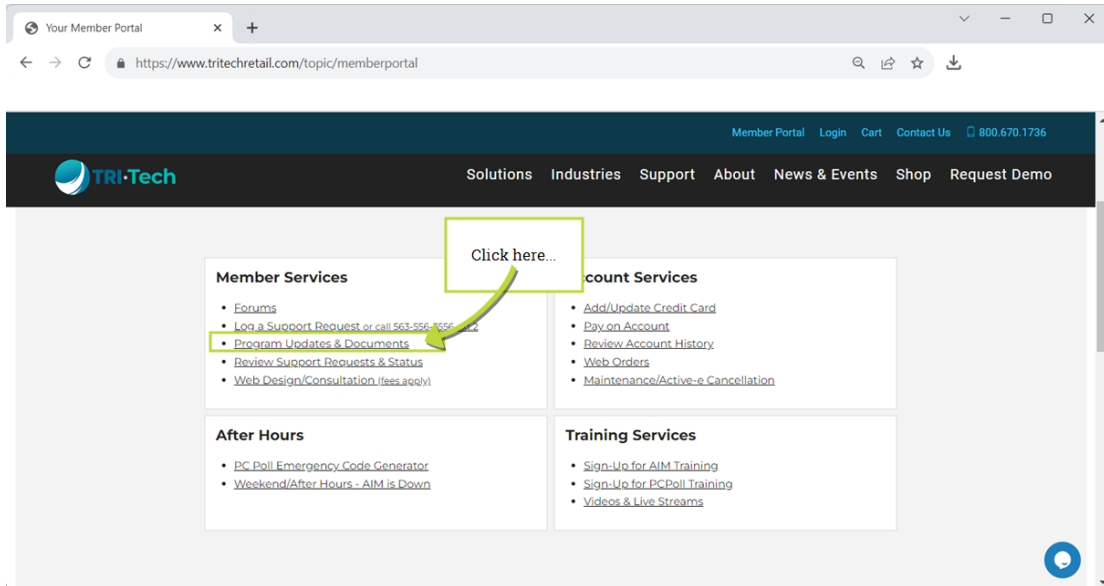
Near the end of this procedure you will need to set up your inventory categories and subcategories. These categories classify the various types of inventory you stock. Setting up these classifications allows you to run inventory and sales reports that help you gauge how much of something you have in 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 this procedure. You can always add or change inventory categories later.

Steps to complete



The screenshots and steps below were taken using a Windows 10 operating system. If you use a different operating system your steps may vary slightly.

1. Verify you have completed the steps in [Set the environment variables](#) on page 5.
2. Close all other programs currently open on the computer where you are installing AIM.
3. Access Member Portal (www.tritechretail.com/t-memberportal.aspx).
4. Click **Program Updates, Videos & Documents**.

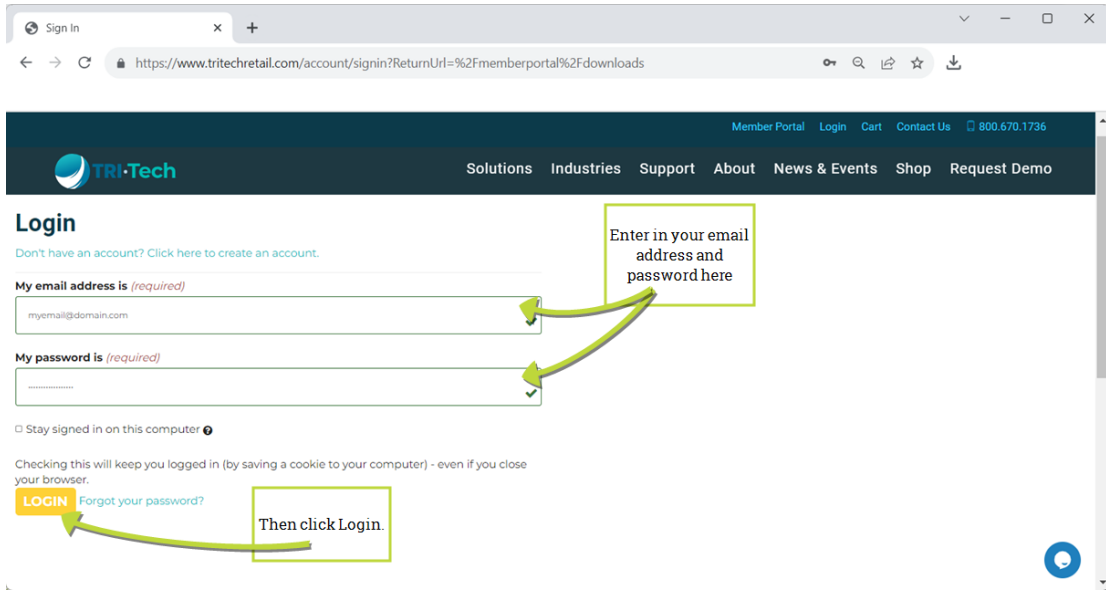


5. Enter your email address and password, then click **Login**. (This may not display for you if you were already logged in to Member Portal.)

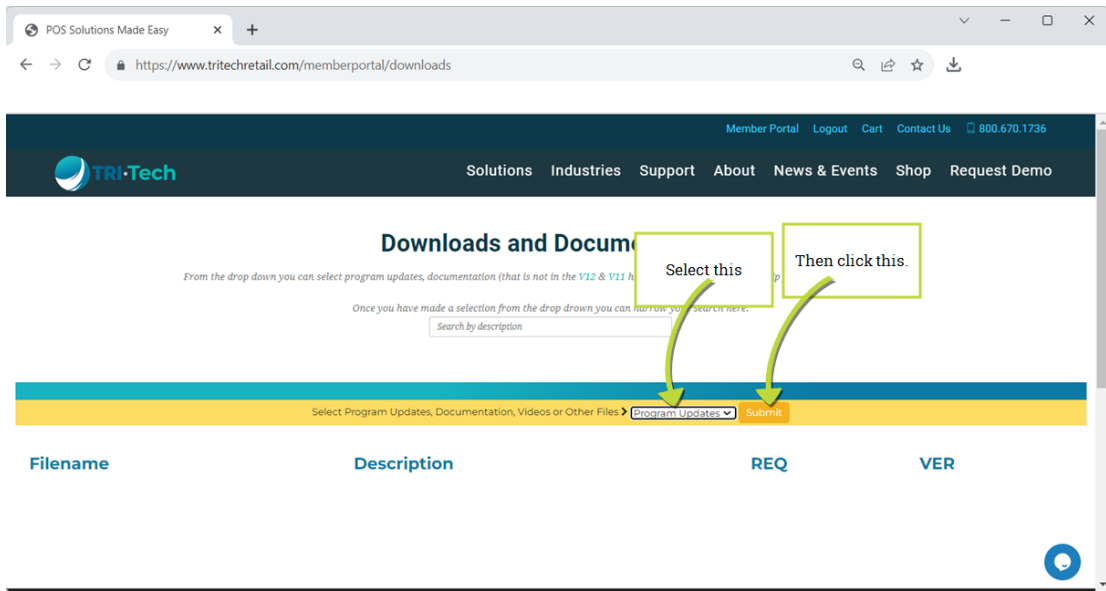


Did you know?

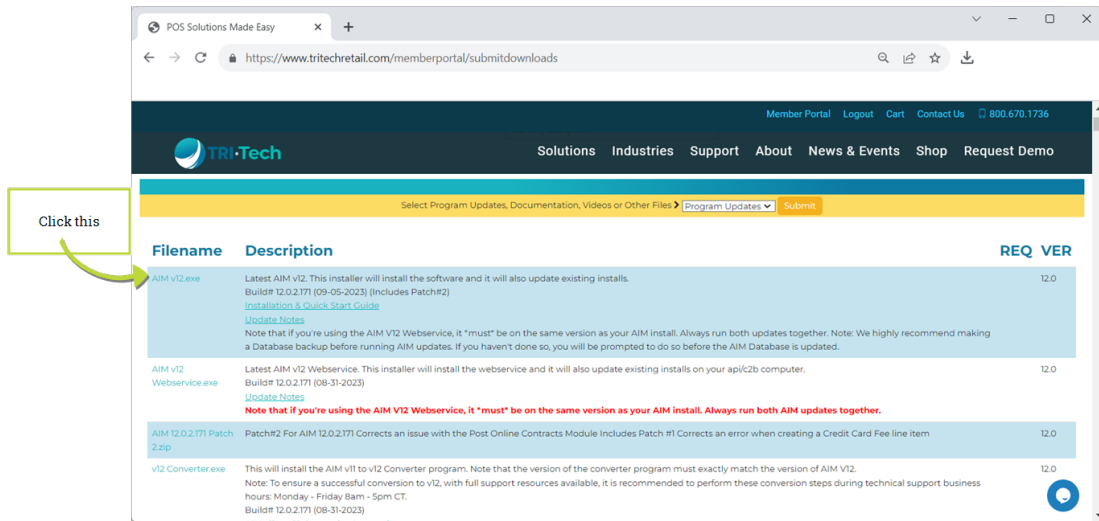
If you have not previously logged in to the Member Portal, you will need the email address on file with Tri-Tech and your account number. Your account number is your temporary Member Portal password. Once you log in you will be asked to change this. You can find your account number in the email sent to you with your license key and your support access number.



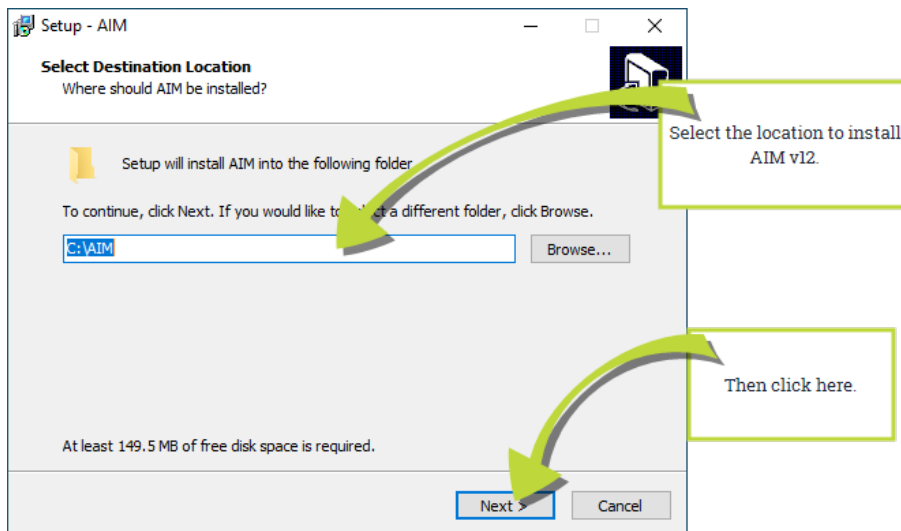
6. Select **Program Updates** in the drop-down box and click **Submit**.



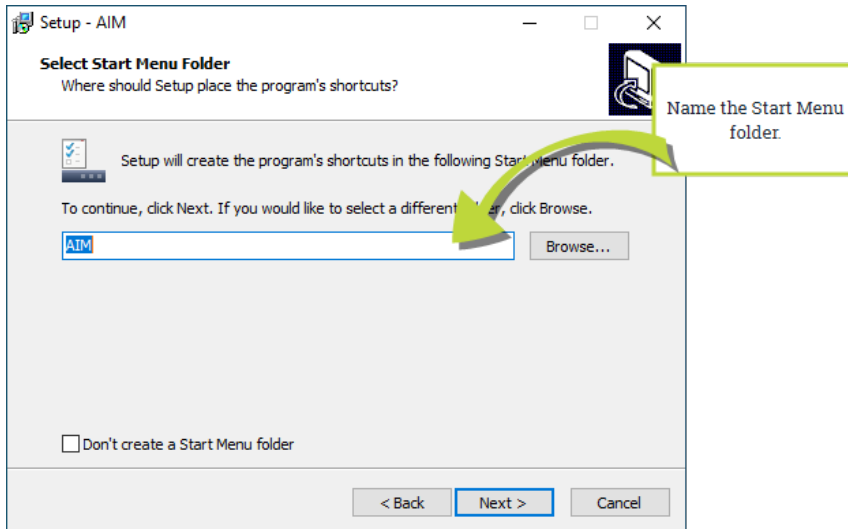
7. In the **Filename** column, click to download **AIMv12.exe**.



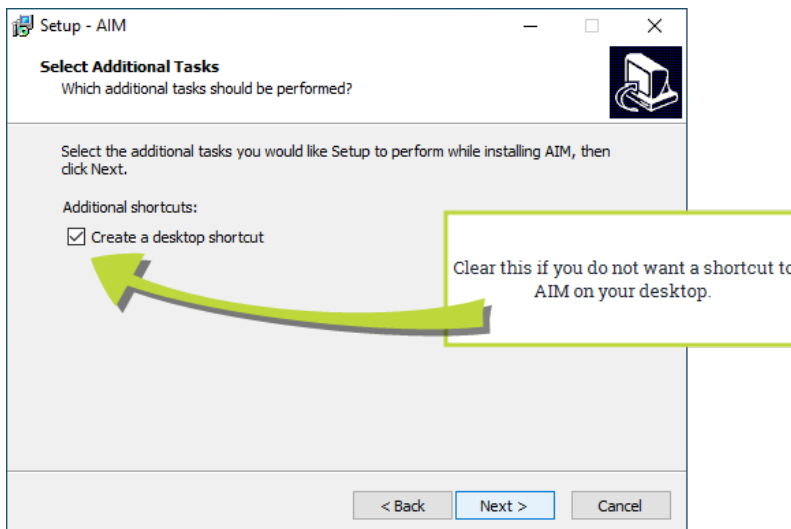
8. When the download is complete, either click the file in the browser's download bar to open it or navigate to the location on your computer where the file was downloaded and double-click the **AIM v12.exe** file.
9. If a security warning displays, click **Run**.
10. A window displays asking if you want to allow the installation. Click **Yes**.
11. If you want to install AIM to a location other than the default, either enter it or click **Browse** and navigate to a location on your computer. Then click **Next**. By default, a new directory called **AIM** will be created on your **C:** drive, but you can select any location.



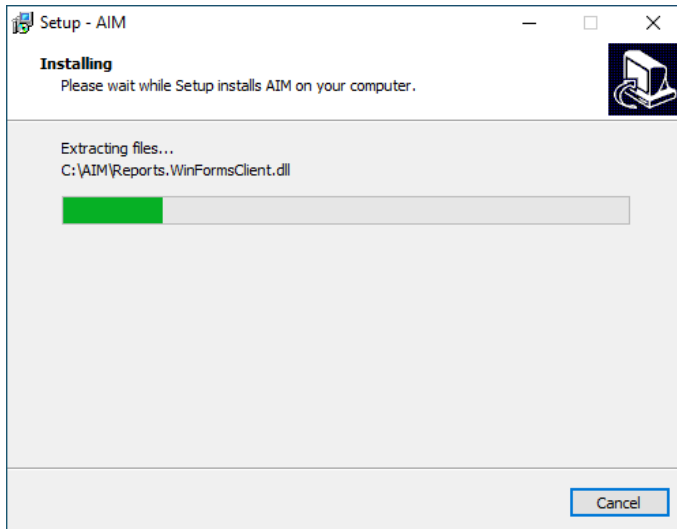
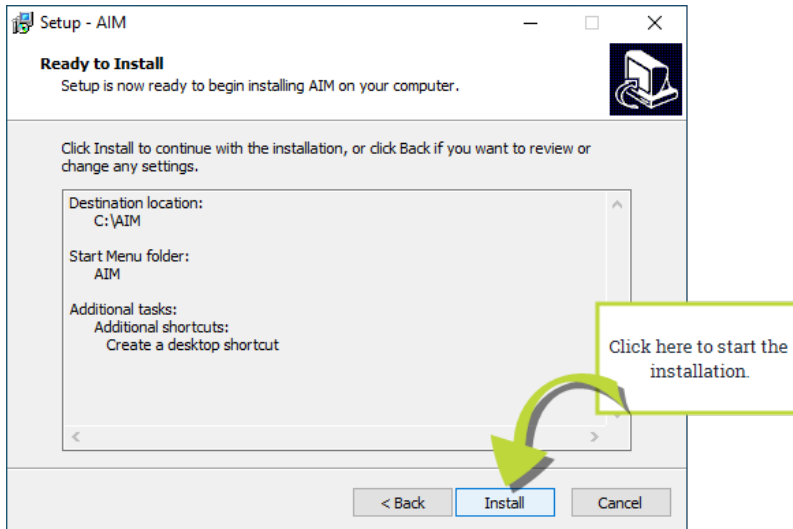
12. Identify the name of the shortcut to create on your Start menu and click **Next**. By default, this is **AIM**. If you do not want to add a shortcut for AIM on your Start menu, select **Don't create a Start Menu folder**.



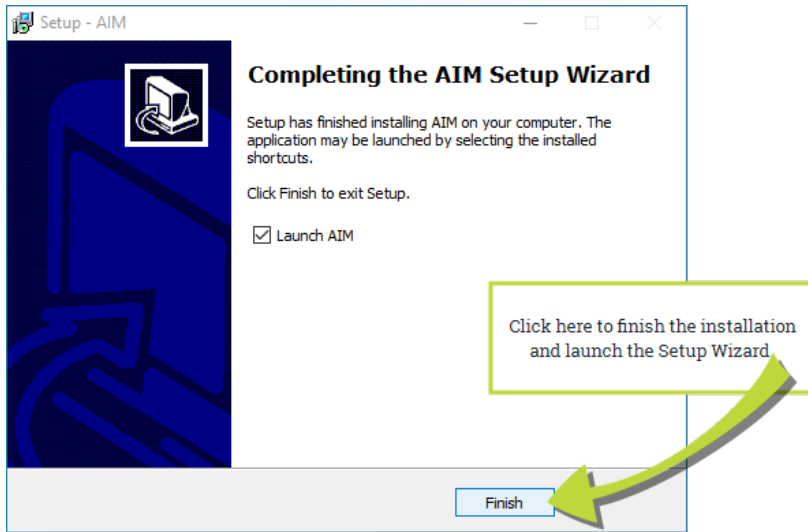
13. A desktop shortcut is automatically created for you. Click **Next** if you want the shortcut added to your desktop. Otherwise, clear the **Create a desktop shortcut** box before you click **Next**.



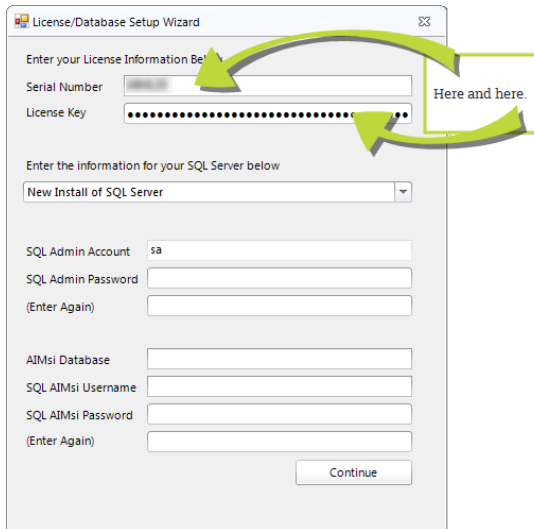
14. Review your selections. If you want to make any changes, click **Back** until you reach the piece you want to change. Change it, then click **Next** to return to this window. Otherwise, click **Install**.



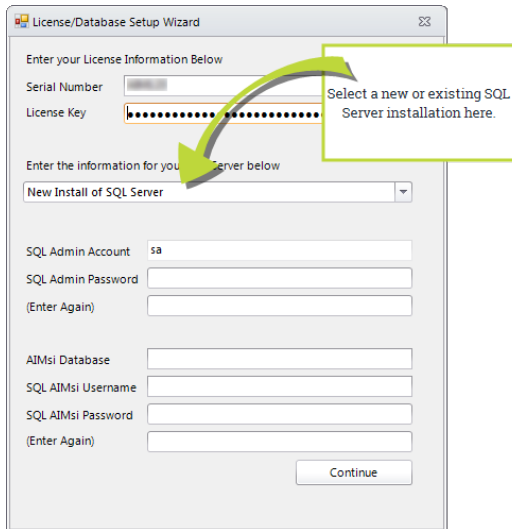
15. Once all of the files are installed on your computer click **Finish**. The Setup Wizard opens.



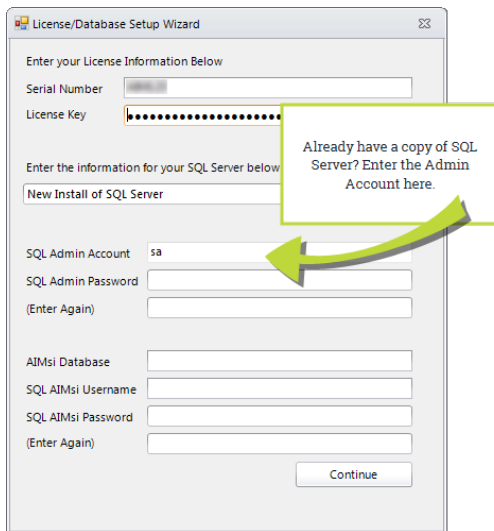
16. On the **License/Database Setup Wizard** window, enter the **Serial Number** and **License Key** provided by Tri-Tech (you received this information in an email).



17. If SQL server is already installed on the server machine, select **Existing Install of SQL Server** and then select the database in the **Database Server** box that displays. Otherwise, select **New Install of SQL Server** to install it now.



18. If you have an already-installed copy of SQL server, enter the name of your SQL admin account in the **SQL Admin Account** box. If you chose **New Install of SQL Server** in the previous step this box defaults to **sa** (this is required for the version of SQL Server that will install).



19. In the **SQL Admin Password** box, type a password for the SQL Admin. Then, enter it again.

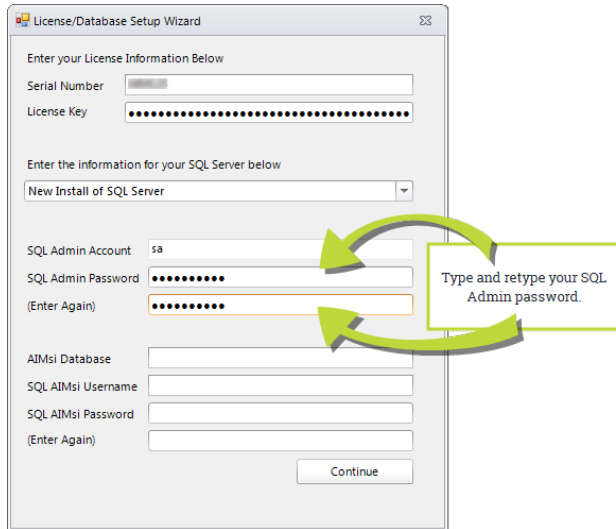


Important!

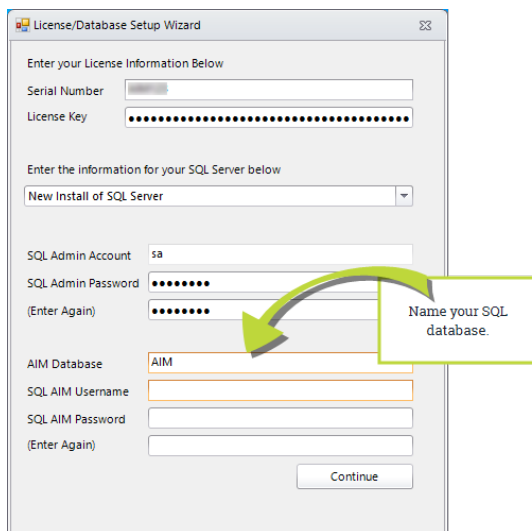
Make a note of this password somewhere. You may need to refer to it in the future, such as for creating a training copy of AIM, for a service computer, or for SQL Manager.

The password must meet the following criteria.

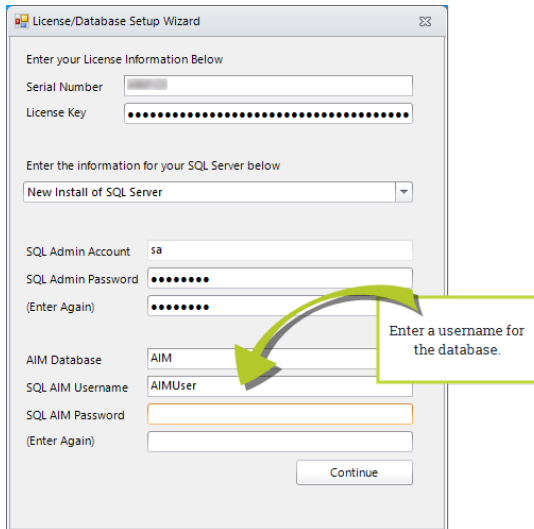
- 8 or more characters in length
- Contains characters from at least three of these categories: uppercase letters (A-Z), lowercase letters (a-z), numbers (0-9), and a special character (!, \$, #, etc.)
- Does not use 3 or more consecutive characters of the user account name bookended by spaces, tabs, returns, or commas, periods, hyphens, number signs, or underscores



20. Enter a name for your SQL Database in the **AIM Database** box.

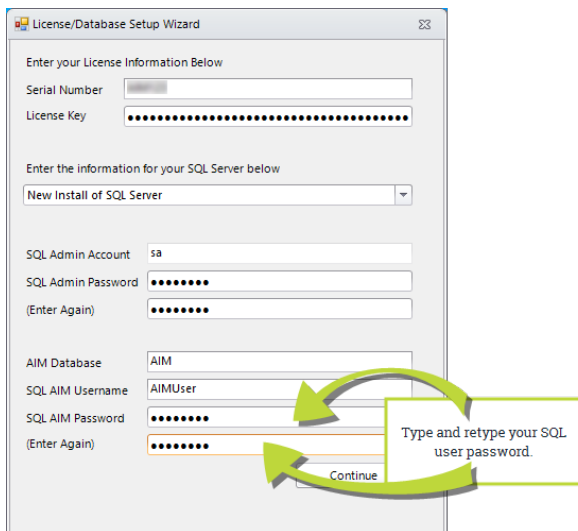


21. Enter an SQL "user" name in the **SQL AIM Username** box.

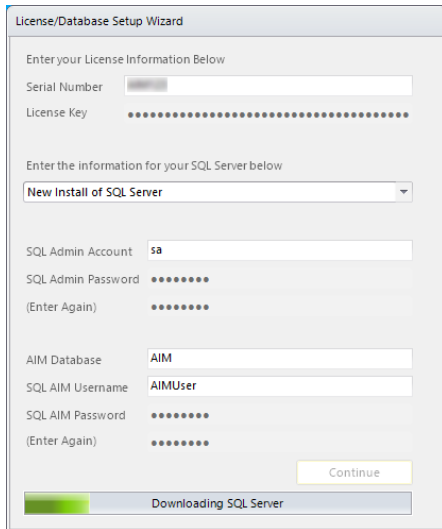


22. Enter the password for your SQL user in the **SQL AIM Password** box. Then, enter it again. The password must meet the following criteria.

- 8 or more characters in length
- Contains characters from at least three of these categories: uppercase letters (A-Z), lowercase letters (a-z), numbers (0-9), and a special character (!, \$, #, etc.)
- Does not use 3 or more consecutive characters of the user account name bookended by spaces, tabs, returns, or commas, periods, hyphens, number signs, or underscores



23. Click **Continue**. The SQL Server download starts if you are installing SQL. If not, the database is created.



License/Database Setup Wizard

Enter your License Information Below

Serial Number

License Key

Enter the information for your SQL Server below

New Install of SQL Server

SQL Admin Account

SQL Admin Password

(Enter Again)

AIM Database

SQL AIM Username

SQL AIM Password

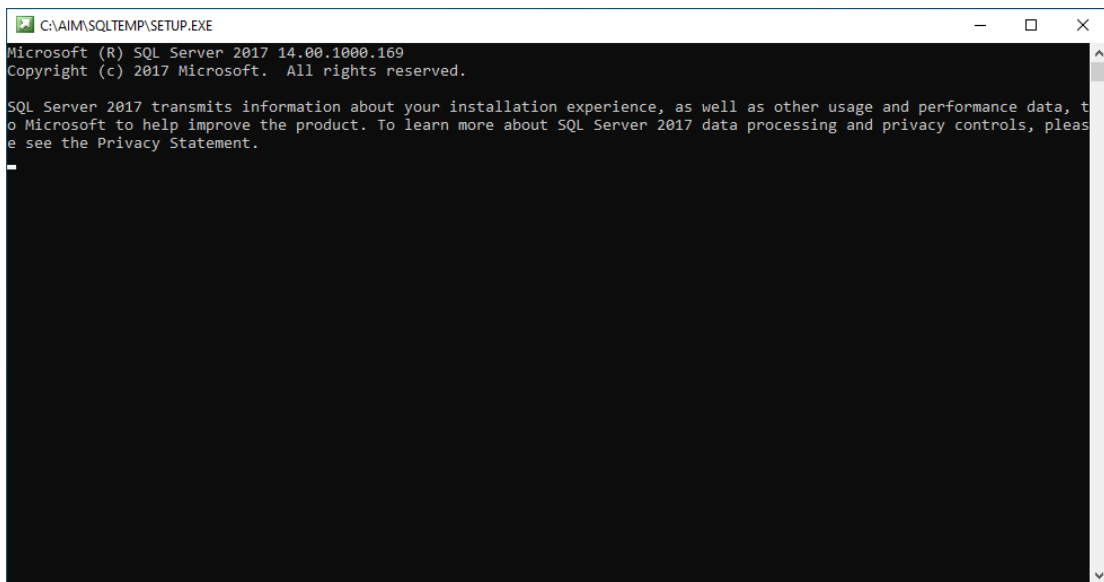
(Enter Again)

Expect the download to take several minutes. When the download completes, a command prompt window displays followed by a series of installation progress windows similar to what is shown below.



WARNING

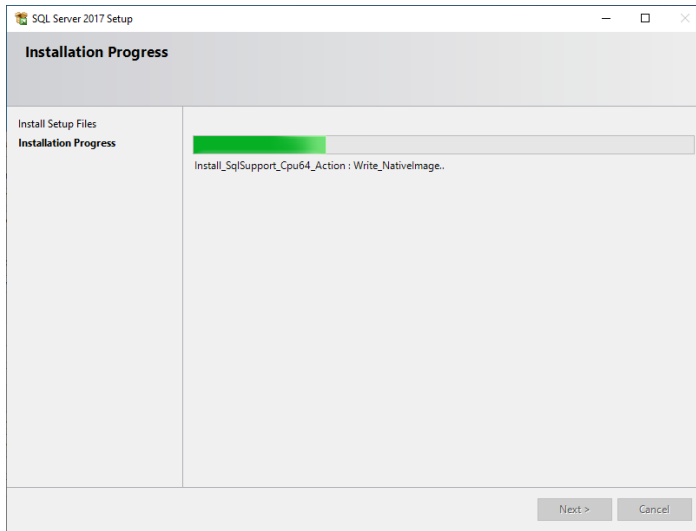
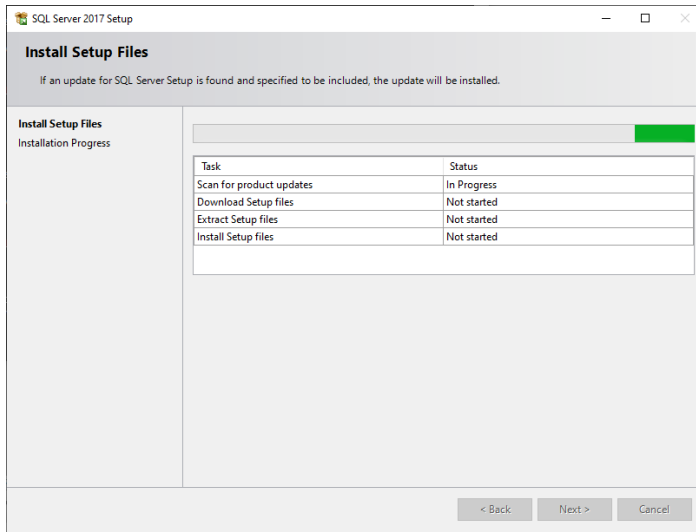
Do not close any of these windows. They will close automatically once the download and installation are complete.



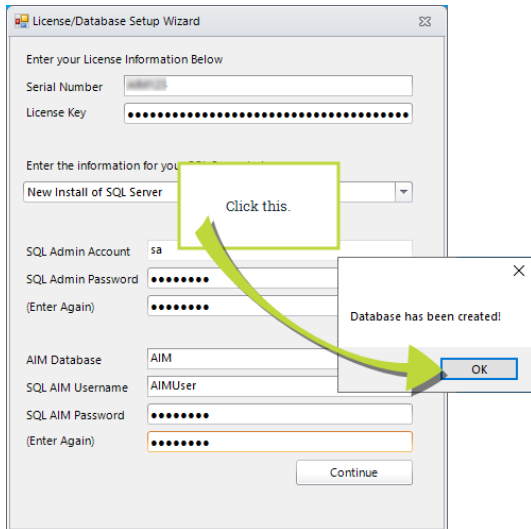
```

C:\AIM\SQLTEMP\SETUP.EXE
Microsoft (R) SQL Server 2017 14.00.1000.169
Copyright (c) 2017 Microsoft. All rights reserved.

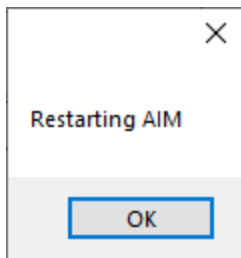
SQL Server 2017 transmits information about your installation experience, as well as other usage and performance data, to Microsoft to help improve the product. To learn more about SQL Server 2017 data processing and privacy controls, please see the Privacy Statement.
  
```

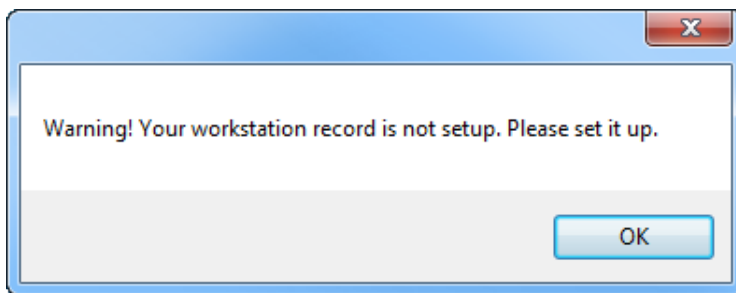
24. When the download and installation are finished, a window displays indicating that the database has been created. Click **OK**.



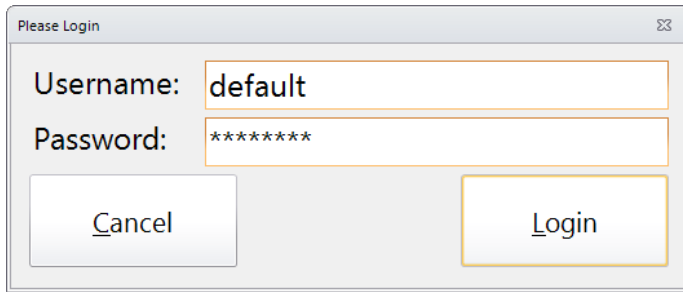
25. A window displays to restart AIM. Click **OK**.



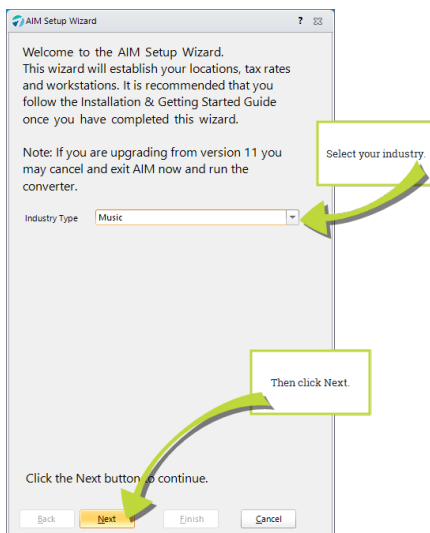
26. A warning displays indicating that your workstation is not set up. This is normal. Click **OK**. The AIM Setup Wizard launches. (If a message displays that indicates your user number has not been set up, complete the steps in [Set the environment variables](#) on page 5.)



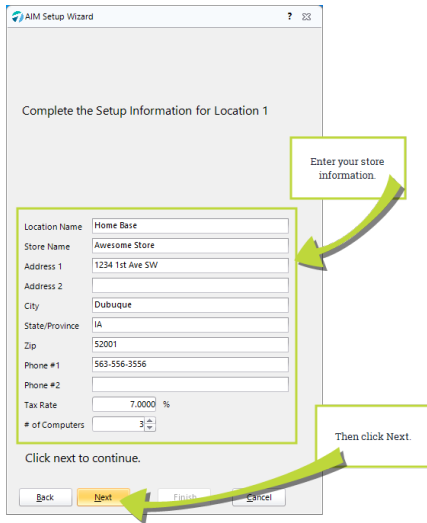
27. The **Please Login** window displays and automatically uses the default credentials to log in (Username = **default**; Password = **PASSWORD**).



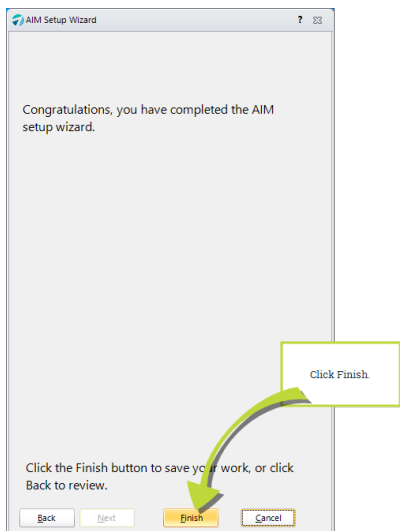
28. At this point, you will be required to enter a new, more secure password. By default, your password must include a minimum of 6 characters and must include at least 1 capital letter, 1 lowercase letter, and 1 number. These requirements may be changed later using system variable PasswordSecurityStrength.
29. Select the industry type most applicable to your business. Then click **Next**.



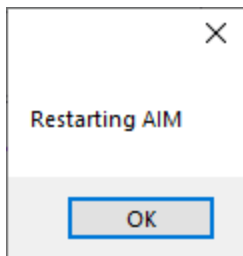
30. Enter basic information about your first location. (City and state automatically populate if you enter a ZIP code first.) Then click **Next**. If you are licensed for more than one store, additional Location windows display for each license. Repeat until you've entered all your locations.



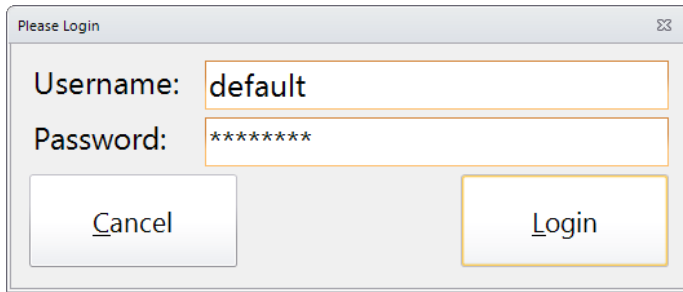
- Once you've entered all your locations, the **Congratulations** window displays. Click **Back** to review any of your entered location information or click **Finish** to save your work.



- A Restarting AIM message displays. Click **OK**.



- The **Please Login** window displays and automatically uses the default credentials to log in (Username = **default**; Password = **Your password from step 28**).



Please Login

Username: default

Password: ****

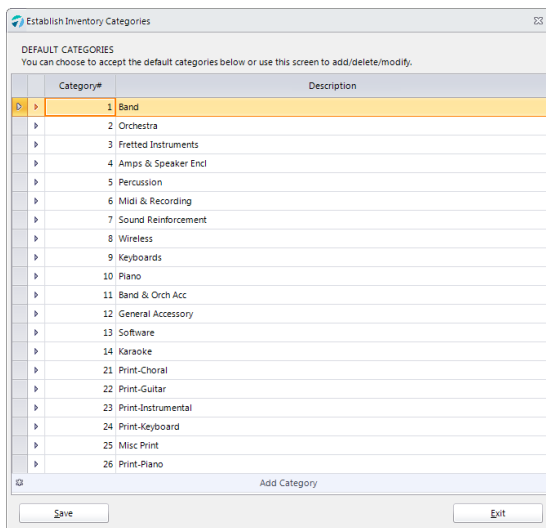
Cancel Login

34. Categories and subcategories are automatically loaded for you based on the industry you selected previously. You can add, alter, or delete these as needed on the **Establish Inventory Categories** window.



Important!

Do not click **Save** until you are finished adding or editing your categories.



Establish Inventory Categories

DEFAULT CATEGORIES
You can choose to accept the default categories below or use this screen to add/delete/modify.

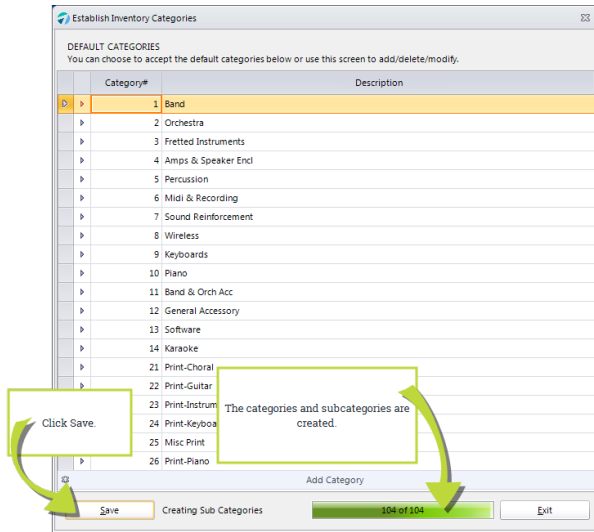
Category#	Description
1	Band
2	Orchestra
3	Fretted Instruments
4	Amps & Speaker Enc
5	Percussion
6	Midi & Recording
7	Sound Reinforcement
8	Wireless
9	Keyboards
10	Piano
11	Band & Orch Acc
12	General Accessory
13	Software
14	Karaoke
21	Print-Choral
22	Print-Guitar
23	Print-Instrumental
24	Print-Keyboard
25	Misc Print
26	Print-Piano

Add Category

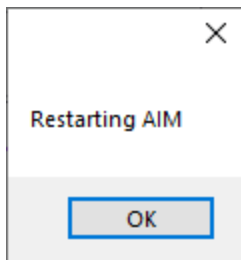
Save Exit

What task do you want to perform?	Then follow these steps.
Add a category	<ul style="list-style-type: none"> a. Below the list of categories, locate and click the option to Add Category. You may need to scroll. b. In the Category# column, enter a number for your new category. AIM automatically defaults to the next available number. c. In the Description column, enter the name of your new category. d. Press Enter to add another new category.
Add a subcategory	<ul style="list-style-type: none"> a. Navigate to the category for which you want to add a subcategory. b. Click the arrow in the left-most column to expand the category. c. Below the last subcategory listed, click Add Sub Category. d. In the Sub# column enter a number for your new subcategory. AIM automatically defaults to the next available number. e. In the Description column enter the name of your new category. f. (For Music industries only) In the Media Inventory column select the check box if this inventory type is media, such as for sheet music. g. Press Enter to add another new subcategory.
Edit a category or subcategory	<ul style="list-style-type: none"> a. Click in the row you want to edit, category or subcategory. b. Click in the column you want to change and enter a new number or name or, if this is a music subcategory, change the Media notation.
Delete a category or subcategory	Right click on the category or subcategory you want to delete and select Delete Row .

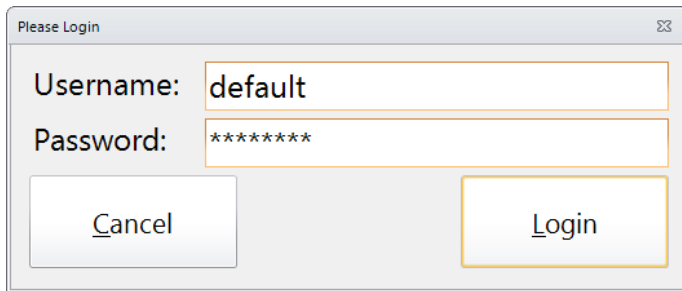
35. When you've finished making any changes, click **Save**. The categories and subcategories are created.



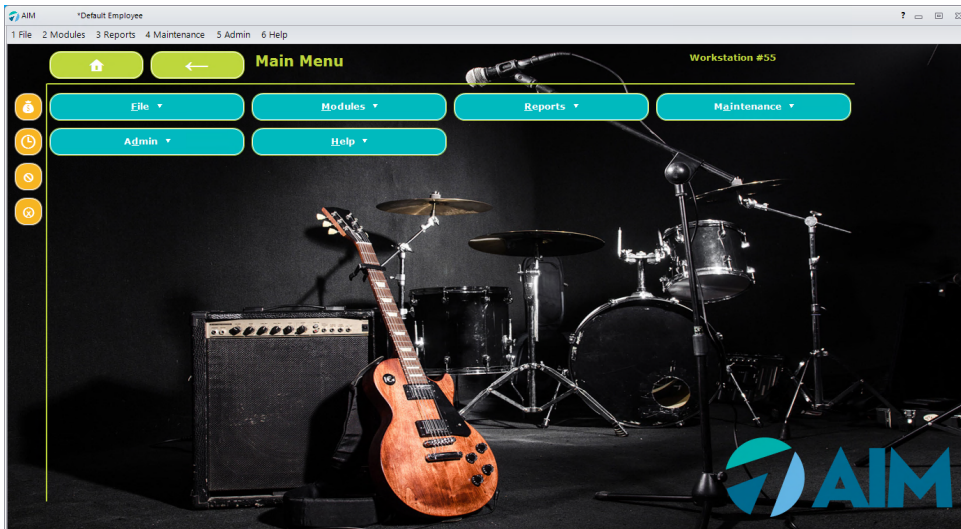
36. When it's complete, a window displays to restart AIM. Click **OK**.



37. The **Please Login** window displays and automatically uses the default credentials to log in (Username = **default**; Password = **Your password from step 28**).



38. AIM opens. (Your AIM may look different depending on the industry you selected.)



39. Continue to [Access AIM from networked workstations](#) below.

What's done for you?

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

- Your store locations are set up with store location codes. To add more details, on the **Maintenance** menu, select **General > Locations**.
- Your tax authorities and tax codes are created. To add more details, on the **Maintenance** menu, select **General > Tax Authorities**.
- Your workstations are assigned unique IDs, a store location, and a tax authority. To review, on the **Maintenance** menu, select **General > 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, on the **Maintenance** menu, select **Customer > 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, on the **Maintenance** menu, select **General > Store Accounts**.

All of the following items are installed with default values when you install AIM. 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 AIM software.

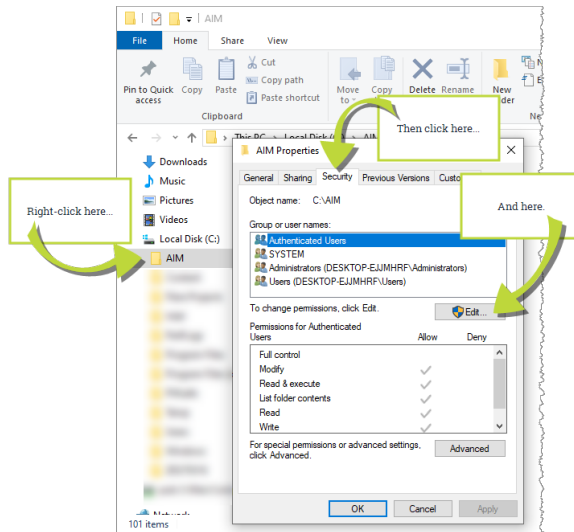
- Payment categories. To review, on the **Maintenance** menu, select **Ledger > Payment Categories**.
- Return payment categories. To review, on the **Maintenance** menu, select **Ledger > Return Categories**.
- Non-inventory categories. To review, on the **Maintenance** menu, select **Ledger > Non Inventory Categories**.

Access AIM from networked workstations

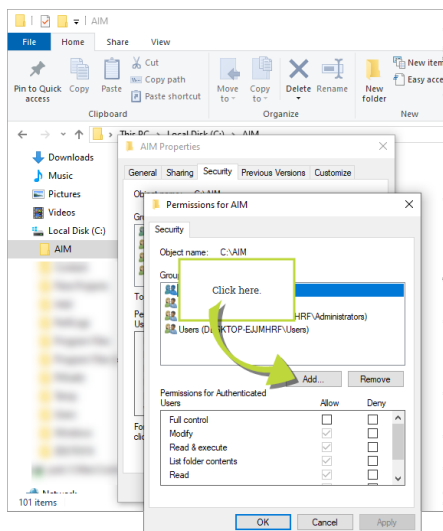
Follow the steps below to access AIM from any ancillary computers networked to your server. These computers must be mapped to your server before you complete this procedure.

Share AIM from the server

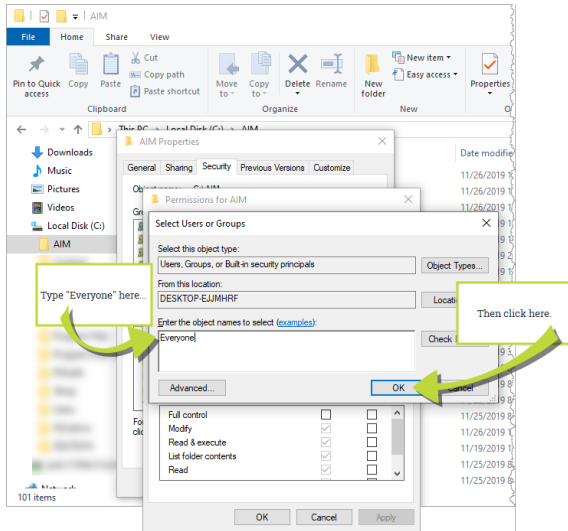
1. Open Windows Explorer.
2. Navigate to the location on the network where AIM was installed.
3. Right-click on the AIM folder and select **Properties**. The **AIM Properties** window displays.
4. Click the **Security** tab.
5. Click **Edit**. The **Permissions for AIM** window displays.



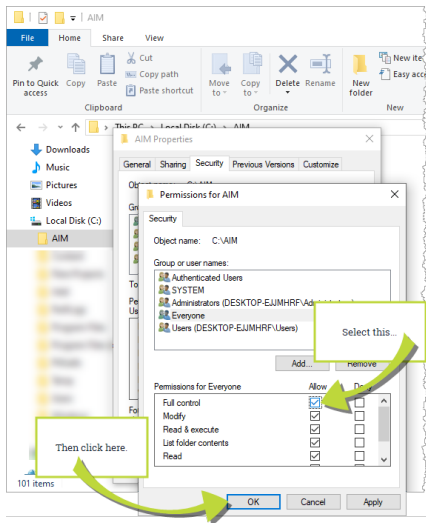
6. Click **Add**. The **Select Users or Groups** window displays.



7. Type **Everyone** in the **Enter the object names to select** box.
8. Click **OK**. The **Permissions for AIM** window displays.



9. Select **Allow Full control** in the **Permissions for Everyone** box.
10. Click **OK**.



Link a networked computer to AIM

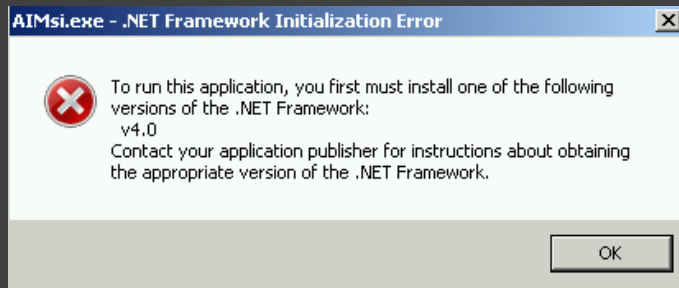
Tri-Tech recommends completing these steps to access AIM from any networked workstations because installing it to one location (your server machine) and linking it to the others (your networked workstations) makes it easier to keep AIM current on software updates at each workstation.

Prerequisites: You must complete the steps in [Install the server copy of AIM](#) on page 8 before you complete the following steps.

1. Open Windows Explorer.
2. Navigate to the location on the network where AIM was installed.
3. Right-click on the **AIM.exe** file and select **Send to > Desktop (create shortcut)**.



You may need to install Microsoft .NET Framework 4.8 on your computer to run AIM. If you get a message similar to the one shown below when you open AIM, go ahead and install .NET (here: <https://www.microsoft.com/en-us/download/details.aspx?id=56116>).



4. Continue to [AIM Setup](#) on page 31.



After installing AIM (on page 5) and setting your environment variables (on page 5), you are ready to begin your basic setup. Each employee must be given access to AIM with a unique password and specific permission to various areas of AIM. You also need to set up maintenance options to suit the needs of your business.

AIM 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 AIM. Tri-Tech strongly recommends that you create employee records for each employee who will use AIM.

General steps for setting up AIM

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

1. Complete the steps in [Add a workstation](#) on the next page to allow each workstation to access AIM.
2. Complete the steps in [Create permission groups](#) on page 33 and [Set up employees](#) to assign your staff access to AIM.

Guidelines for setting up workstations

There are specific defaults that must be established for each workstation accessing AIM. If you are running the software on a stand-alone computer, you will have one workstation record. If you have eight computers on the network, you will have eight workstation records. If you have multiple store locations that are online, each of those remote computers is a workstation and needs a workstation record.

You can establish all of your workstation records from just one computer (your server computer). It is not necessary to access each individual workstation to establish its workstation number. It is important, however, that the workstation number match the user number variable for each computer. If you do not know the user number established for a workstation, on that computer, go to Help > About AIM. The user number variable displays in the Workstation box.

Guidelines for setting up group permissions

Tri-Tech recommends that you [Create permission groups](#) on page 33 for your employees that allow access to specific functions in AIM, 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 AIM, review the Select Security Item window. (Go to Admin > Employee/Security > Employee. Click the small Add button on tab 3.)

Guidelines for setting up employee credentials

The default employee for AIM is **default** and the default password is **PASSWORD**, in all uppercase. Use these credentials to log in to AIM and establish your employee login credentials and permissions (see page 35). Tri-Tech recommends setting up your employee passwords as follows:

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

Add a workstation

Follow the steps below to set up the individual workstations in your store(s). This includes how AIM looks, defaults for using point of sale and purchase orders, printing defaults, email defaults, credit card processing defaults, and default file locations.

Refer to the online help for detailed descriptions of the boxes on this window.

Clone or Add?

It's totally up to you. You must have at least one workstation set up before you can clone a workstation to create a new workstation. However, if you're setting up several workstations with essentially the same requirements, go ahead and add the first and then use that to clone the rest. You can always alter details for any cloned workstations.

Steps to complete - Add

Prerequisites: Set the [environment variables](#) on page 5 before adding workstations.

1. On the **Maintenance** menu, select **General > Work Stations**. The **Work Stations** window displays.
2. Click **Add**.

The screenshot shows the 'Work Stations' window with the following details:

- Table:**

#	Description	Ina...
26	Workstation # 26	<input type="checkbox"/>
28	Computer 28	<input type="checkbox"/>
29	Computer 47	<input type="checkbox"/>
33	...	<input type="checkbox"/>
34	...	<input type="checkbox"/>
35	...	<input type="checkbox"/>
36	...	<input type="checkbox"/>
37	...	<input type="checkbox"/>
38	...	<input type="checkbox"/>
39	...	<input type="checkbox"/>
40	...	<input type="checkbox"/>
42	...	<input type="checkbox"/>
43	...	<input type="checkbox"/>
44	...	<input type="checkbox"/>
47	...	<input type="checkbox"/>
48	...	<input type="checkbox"/>
55	...	<input type="checkbox"/>
64	...	<input type="checkbox"/>
137	...	<input type="checkbox"/>
66	...	<input checked="" type="checkbox"/>
- Form Fields:**
 - Work Station#:
 - Client/Computer Name:
 - Description:
 - Location:
 - Tax Authority:
 - Application Theme:
 - Store Name:
 - Address:
 - City:
 - St/Province:
 - Zip:
 - Country:
 - Phone 1:
 - Phone 2:
 - Home Menu:
 - Toolbar:
- Buttons:** Inactive,
- Hint:** Pressing the F7 key on a selected field will allow you to update every workstation record to the field's current value.
- Bottom Buttons:**

3. Enter a **WorkStation#**. These are established when you set up your environment variables.
4. Enter a description for this computer.
5. Complete the store information including a tax authority, address, and phone numbers.
6. (Optional) Customize the appearance of your AIM program on each workstation using the **Home Menu** and **Toolbar** boxes. These are specific to any touchscreen menus you have established in **Maintenance > General > Touchscreen Menus**.
7. Use the **POS** tab(s) to set up any defaults you want this workstation to use during a point of sale transaction. For example, the number of receipts to print, the price level to use, or a printer driver for your cash drawer.
8. Use the **PO** tab to set up any defaults you want this workstation to use for purchase orders. For example, contact information, label printing, or a default receiving location.
9. Use the **Misc** tab(s) to set up defaults you want this workstation to use for things like automatically logging users out of AIM, including tax on contract amounts, and label printers.
10. Use the **Communications** tab to set up defaults for emails sent from this workstation.
11. Use the **CC** tab(s) to set up credit card defaults such as your 3rd-party vendor ({{{Undefined variable 3Party. }}}, TSYS Merchant Solutions, WorldPay, or similar) and the specific settings for that vendor. Clear the **POS Gateway** and **Auto/Web Pay Gateway** boxes if you are setting up a test system.
12. Use the **Files** tab to set up default storage folder locations such as for customer images or scheduling attachments.
13. When you've set up your workstation as desired, click **Save**.
14. Continue to [Create permission groups](#) below.

Steps to complete - Clone

Prerequisites: [Set the environment variables](#) on page 5 before adding workstations.

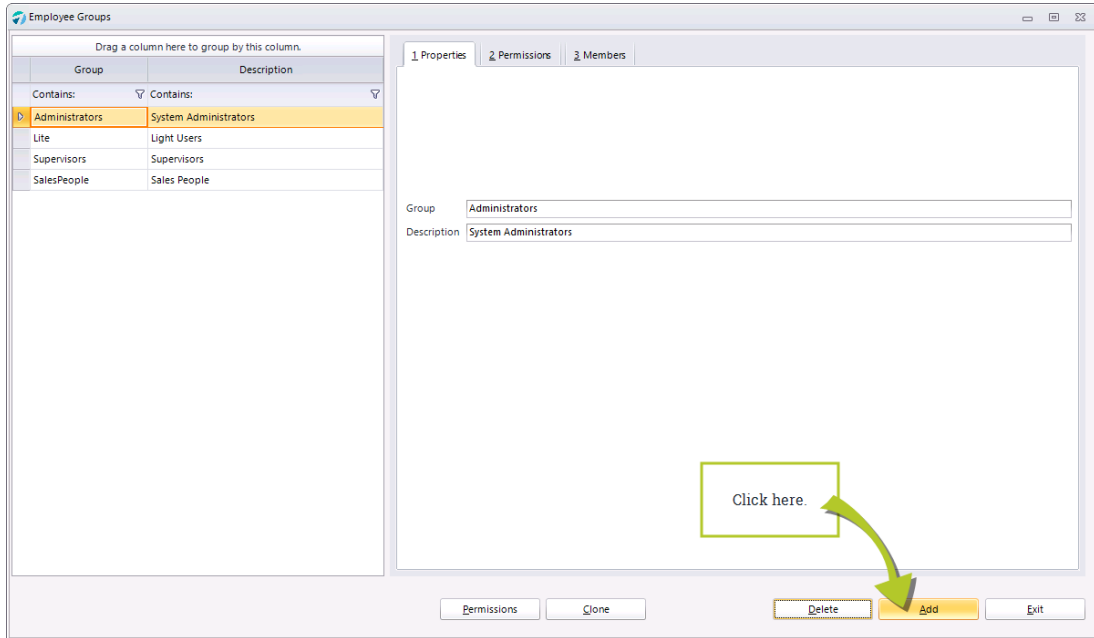
1. On the **Maintenance** menu, select **General > Work Stations**. The **Work Stations** window displays.
2. In the grid, select the workstation you want to copy to create a new workstation.
3. Click **Clone**.
4. Enter the workstation number for the copied workstation in the pop-up window and click **OK**.
5. If necessary, alter any details about the new workstation and click **Save**.
6. Continue to [Create permission groups](#) below.

Create permission groups

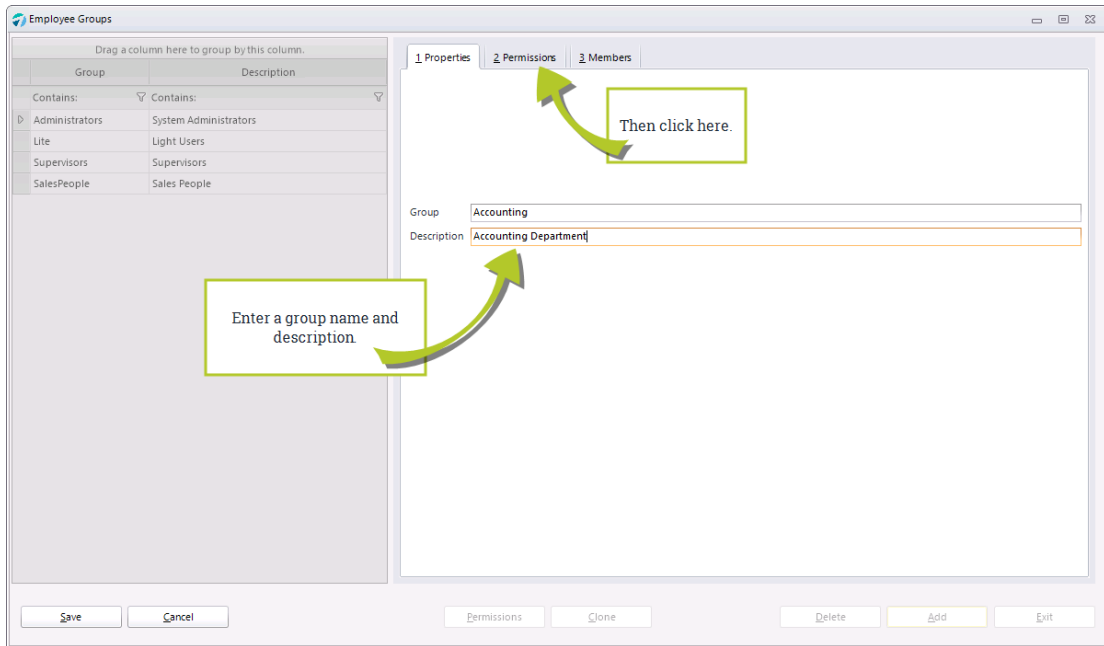
Follow the steps below to create your permission groups and assign them to employees.

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

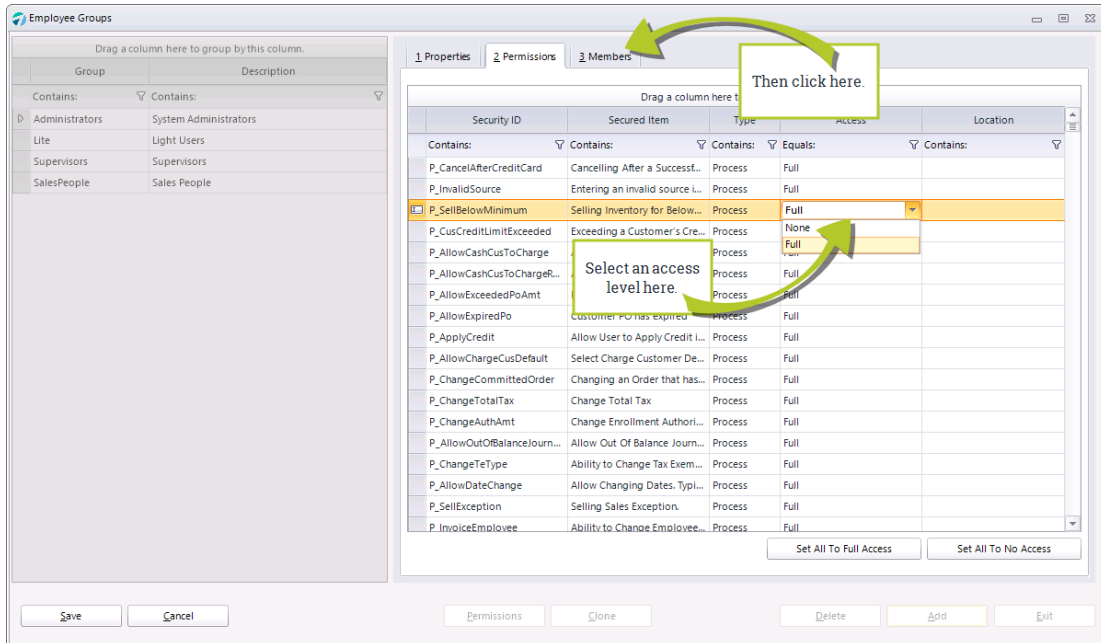
1. On the **Admin** menu, select **Employee/Security > Employee Groups**. The **Employee Groups** window displays.
2. Click **Add**.



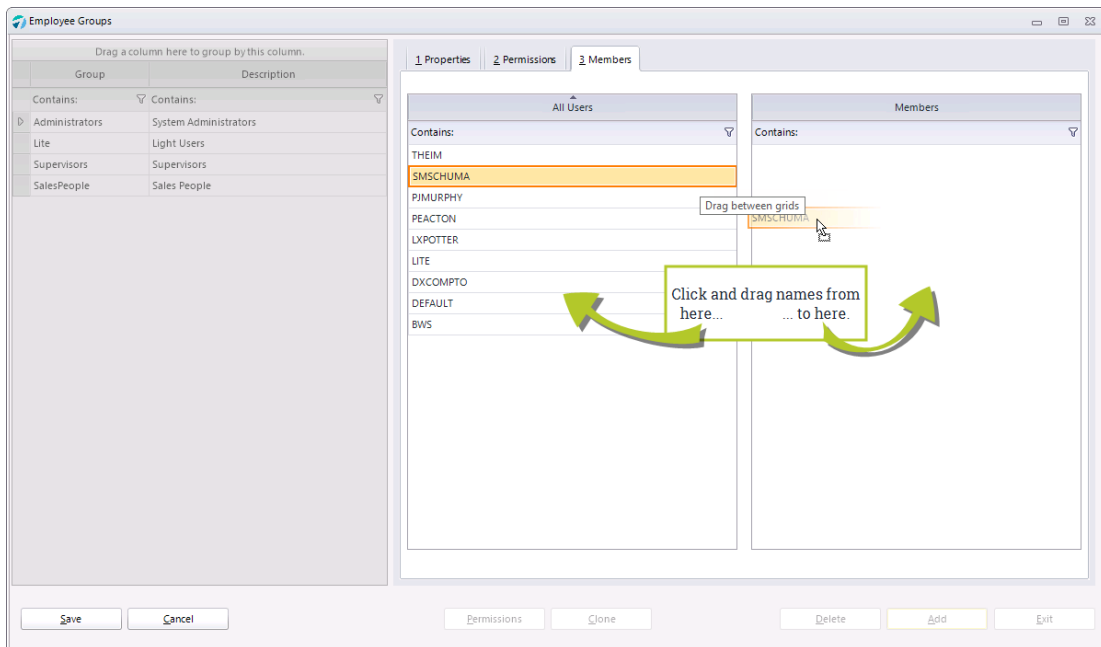
3. Enter a group name, such as **Accounting**, in the **Group** box.
4. Enter a description for the group in the **Description** box.



5. Click the **Permission** tab. Use the **Access** column to assign the appropriate access level (Full, None, or Read-Only) to each secured item. Read-Only is available for some, but not all, secured items.



- Click the **Members** tab. Click a name in the **All Users** box and drag it to the **Members** box to include that person in the new group.



- Click **Save**.
- Continue to [Set up employees](#) below.

Set up employees

Follow the steps below to establish a new employee in AIM (assign a user name, password, and permissions groups, etc.).



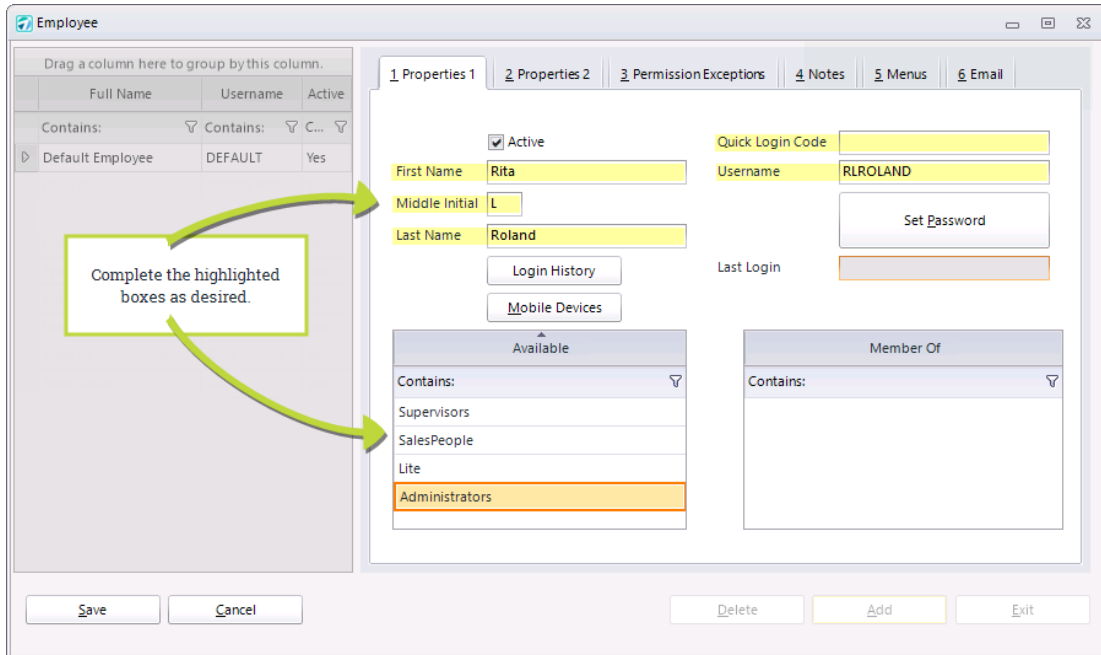
Important!

If you are a new AIM user (and even if you're not) Tri-Tech recommends that you do not remove or edit the *default* user provided with the software. You do not need to use the *default* user, but keeping it tucked away ensures that you always have a working user name and password should others become corrupt or otherwise unusable.

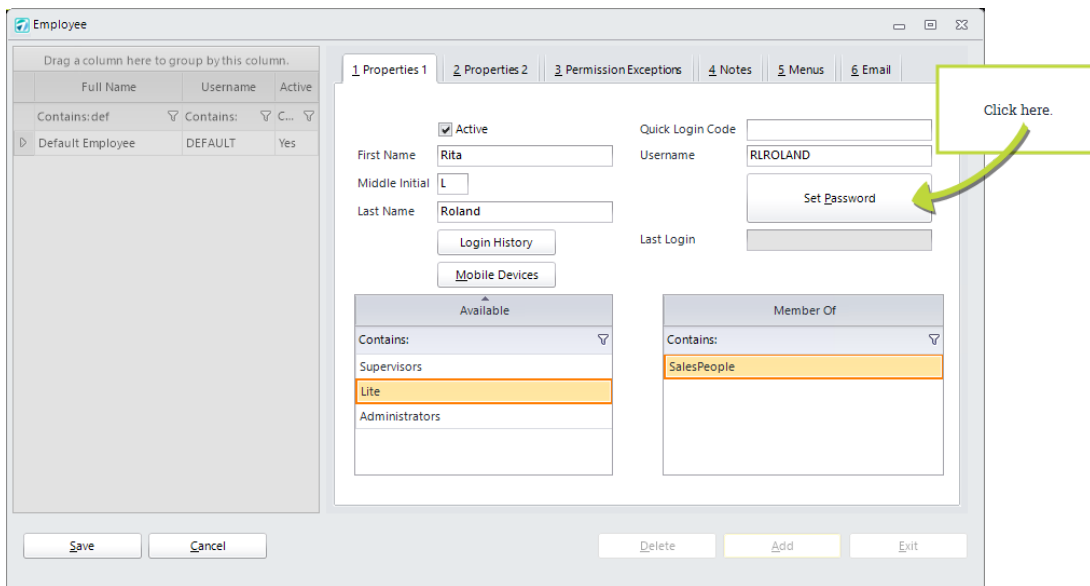
Prerequisites: You must have at least one permission group to be able to create and save a new employee record. For more information, refer to [Create permission groups](#) on page 33..

1. On the **Admin** menu, select **Employee/Security > Employee**. The **Employee** window displays.
2. Click **Add**.

3. Enter the employee's first name, an optional middle initial, and his or her last name.
4. Enter a user name for the employee if different from the default (by default, the user name is a combination of the first, middle, and last names).
5. If you plan to allow your employees to log in with a login code rather than by entering a user ID and password, enter that code in the **Quick Login Code** box.
6. Assign one or more groups to the employee by dragging groups from the **Available** grid to the **Member Of** grid.



7. Click **Set Password**. The **Change Password** window displays.



8. Enter a password for the employee and click **OK**. This password must meet the level of security established in the **PasswordSecurityStrength** system variable. The default requirements for employee passwords are as follows.

- It must be a minimum of 6 characters long.
- It must include at least 1 capital letter.
- It must include at least one number.
- It must *not* include any special characters.
- It must be unique from the previous 5 passwords.



Employee passwords are case sensitive and must be entered using the correct case in order to log in to AIM. Zero (0) values in system variable **PasswordSecurityStrength** indicate that the requirement is optional. For example, if the 4th position (special characters) is set to 0, the use of special characters in a new password is optional, but not required.

Steps 9-25 are optional.

9. On the **Properties 2** tab, enter basic demographic information including address, email, phone numbers, and Social Security number.
10. Select the department and location where the employee works, such as Administration and Dubuque.
11. Select the **Required to be Clocked In** check box to require your employee to clock in through AIM. If this check box is selected your employees cannot post anything in AIM until they clock in.
12. Enter a pay frequency, wage information, and any exemptions.
13. If you have employee IDs for a 3rd party software system, such as an outside accounting firm or an electronic keycard system, enter it in the **3rd Party ID** box.
14. Enter an employment start date.
15. If you use the Touchscreen module and want to color-code open customer tabs by the employee who opened it, enter values for the **Use Touchscreen Button Colors** and **Button Color** boxes.
16. Enter the number of days after which the employee's password must be changed in the **PW Expiry Days** box.

Examples of information you might enter in steps 9-16.

- If the employee requires a permission level to a secured item that is different than what is set up for that item in the assigned group(s), click the **Permission Exceptions** tab. If not, skip ahead to adding information on the **Notes** tab.

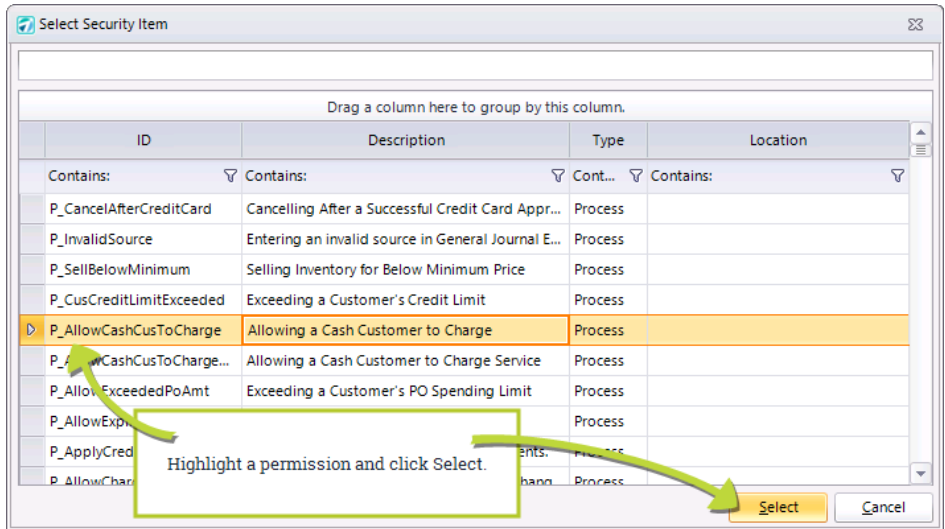


Permission exceptions for the employee will override any group permissions.

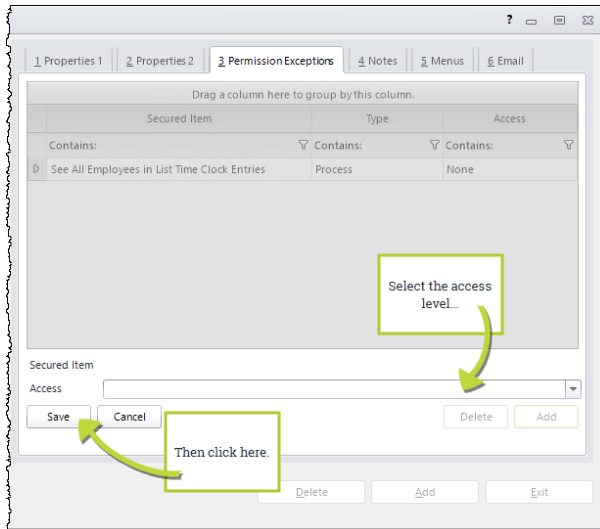
- Click **Add**. The **Select Security Item** window displays.

Secured Item	Type	Access
Contains:	Contains:	Contains:

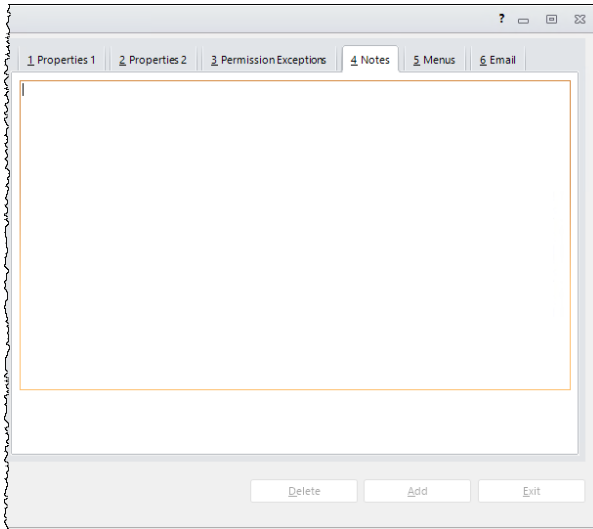
- Highlight the secured item you want to change access for and click **Select**. The **Employee** window displays.



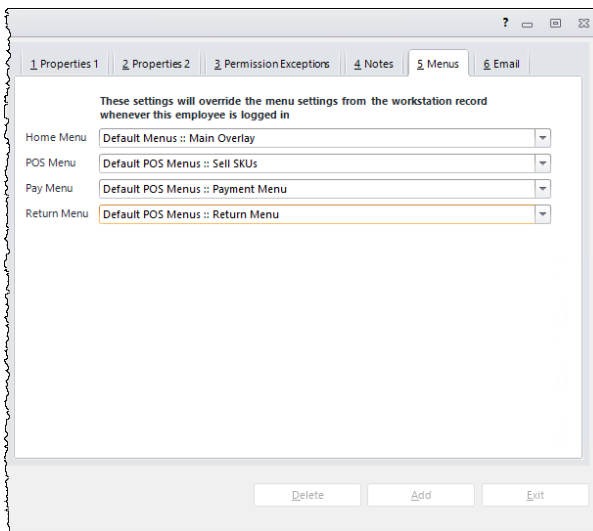
20. Select an access level for the secured item in the **Access** box and click **Save**. The exception is added to the grid.



21. If you need to enter any notes about the employee, click the **Notes** tab and enter them in the large box.



22. If you want this employee to have a different set of menus that display other than the defaults, click the **Menu** tab.
23. Select the specific menu formats that should display for this employee's Home, Point of Sale, Payment, and Return functions.



Example of menus you might select.

24. If you want this employee to have email settings that override the ones for the workstation, click the Email tab.
25. Enter the specific email overrides you want this employee to have.

Example of email overrides you might set.

26. Click **Save**.

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 briefly outlines 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 records may be created in AIM 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 the Point of Sale section 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 AIM 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 in your AIM software.

1. Prior to using the Service module, you must set up the service table and service status codes on the Maintenance > Service menu.
2. Prior to using the Purchase Order module, you must set up the problem codes and shipping codes on the Maintenance > Order menu.
3. Prior to using the General Ledger module, you must verify that the system categories and chart of accounts are set up properly on the Maintenance > Ledger menu.

-
4. Prior to using the Rent and Sales Contracts module, you must set up the contract defaults on the Maintenance > Contract menu.
 5. Prior to using the Scheduling module, you must set up the items on the Maintenance > Scheduling menu.
 6. If you are a consignment or resale store, complete the consignment options available on the Maintenance > Inventory 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 AIM software: create and use a test environment ([below](#)) and perform daily backups of the software ([see page 48](#)). Doing both of these things will ensure that your everyday copy of AIM 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" AIM 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 AIM 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 AIM – all without affecting your live data.

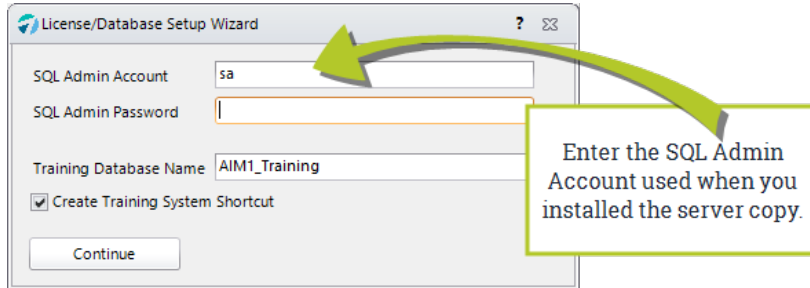
It is simplest to create a test environment on your server and point to it from the other networked workstations. In this way, when you apply AIM updates, you only need to do it once.

Prerequisites: Close AIM on all of your workstations before beginning this procedure. Then, complete these steps on your AIM server (refer to [Install the server copy of AIM](#) on page 8 for additional information; the default location is C:\AIM V12).

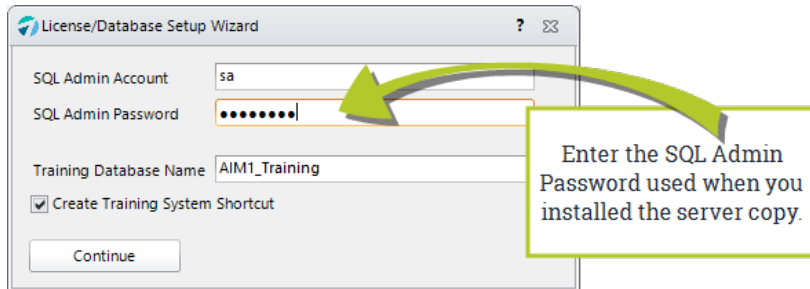
1. Log in to AIM.
2. Navigate to **Admin > Utilities** and select **Setup Training System**.



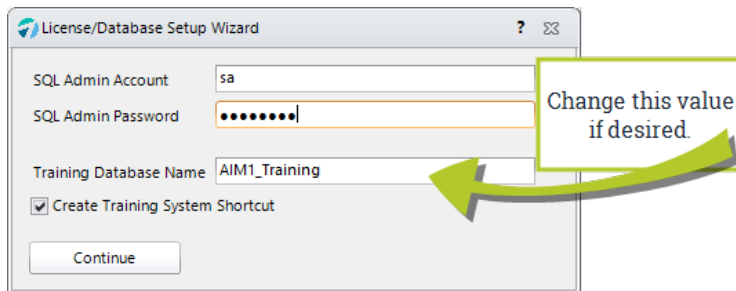
3. On the **License/Database Setup Wizard** window, enter your SQL admin account in the **SQL Admin Account** box. If you installed SQL Server when you installed your server copy of AIM, this value is **sa**.



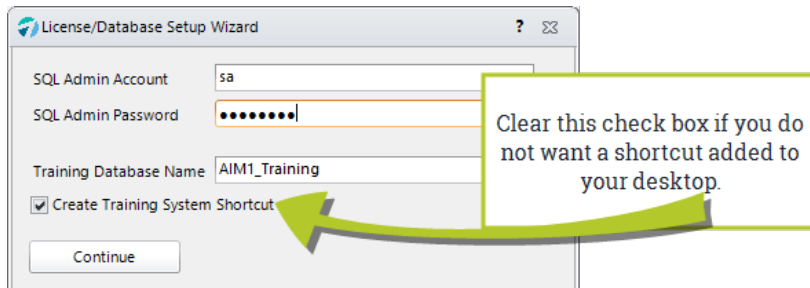
4. Enter the **SQL Admin Password** you used when you created your server copy of AIM.



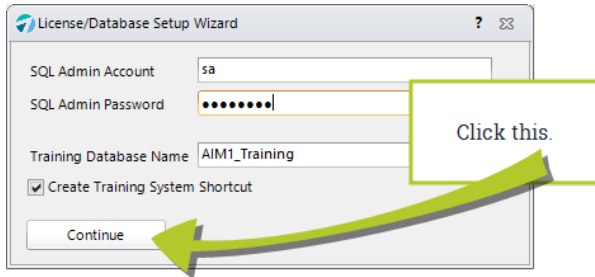
5. By default, the **Training Database Name** is the name you assigned to your database when you installed the server copy appended with **_TRAINING**. Change it if desired.



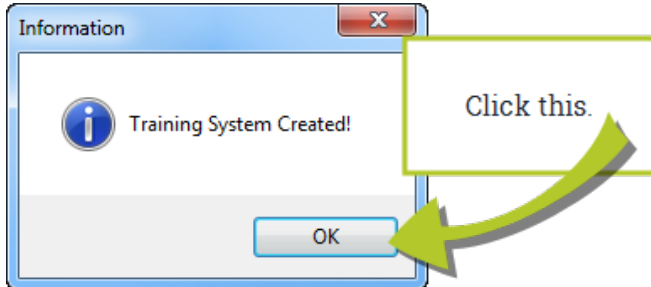
6. A shortcut is automatically added on your desktop for the new training system. If you do not want a shortcut, clear the **Create Training System Shortcut** check box.



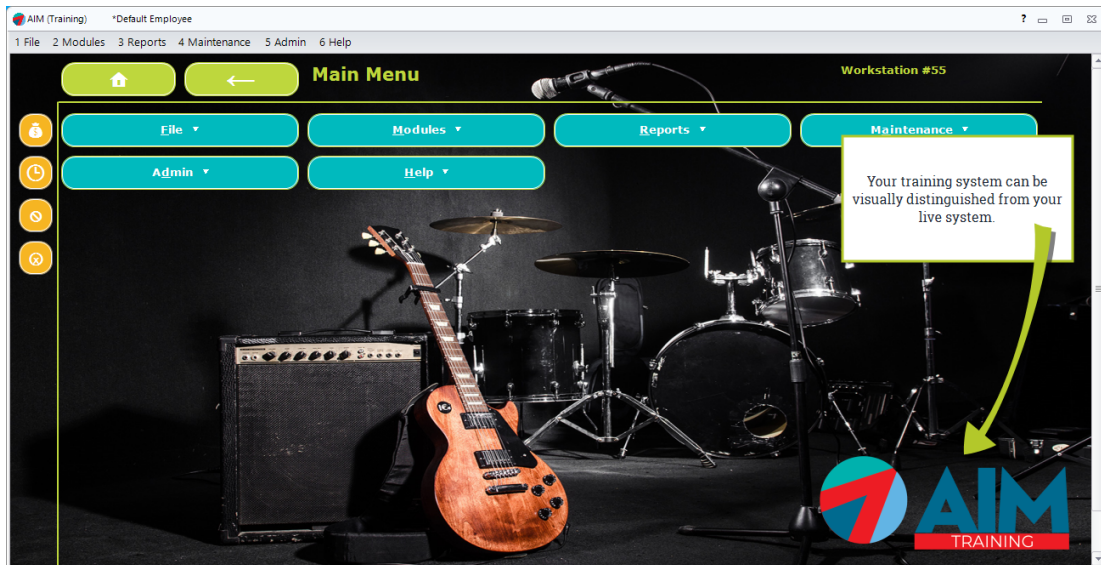
7. Click **Continue**.



8. When the training system is created, a message displays. Click **OK**.



9. If you open the AIM training system, you'll see it looks slightly different from the working copy and includes the text "**TRAINING**" in the lower right corner. (Your AIM may look different depending on the industry you selected.)



10. Continue to [Back up AIM](#) on the next page.

Back up AIM



Important!

AIM contains invaluable information, the loss of which may create a hardship for your business. You must back up AIM daily.

We recommend that you keep your backup media off site to avoid fire or other unexpected damage or loss of your backups. We also recommend that you test the backups weekly to verify the media is still good and the backups are working.

What you use to back up your software is entirely your choice. One option is to use an online data backup and recovery service to automate and secure the backup process. Tri-Tech has a partnership with Divinsa for this process, though other options are available to you. For more information on Divinsa, please visit their website at www.divinsa.com or contact [Tri-Tech Sales](#).

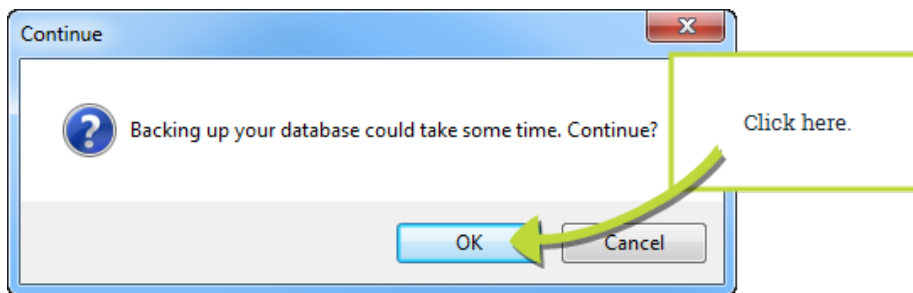
Alternatively, you can manually or automatically back up your AIM software on the server where AIM is installed.

Manually back up your software

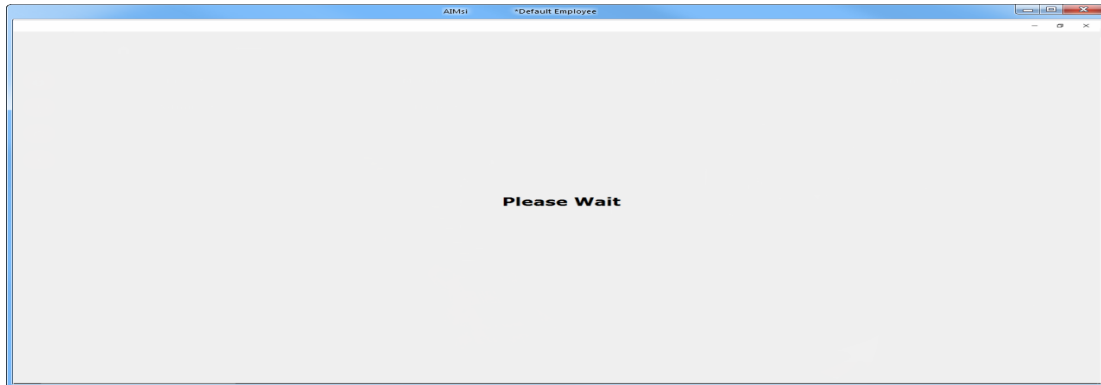
Use the following steps to back up your AIM software on the server where AIM is installed. This creates an SQL database backup that you can retrieve should you need to restore your database. Typically, you can find that backup file here: C:\Program Files\Microsoft SQL Server\MSSQLXX\AIMSQL\MSSQL\Backup\YourDatabaseName.bak.

ALWAYS close AIM on **ALL** workstations before you begin a system backup.

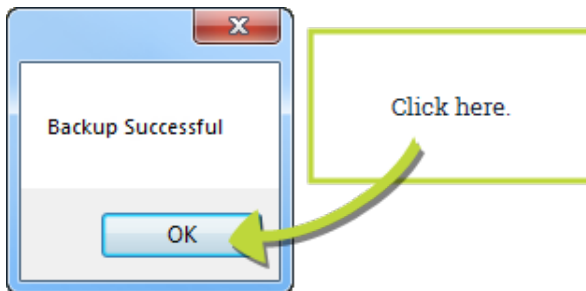
1. In AIM, navigate to **Admin > Utilities > Database Backup**.
2. A message displays asking if you want to continue with the backup. Click **OK**.



While the backup is working, you will see a screen similar to the following.

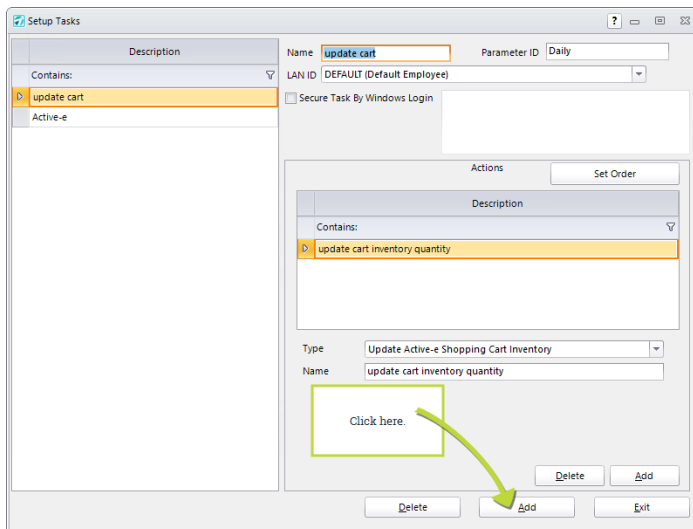


3. When the backup is finished, click **OK**.



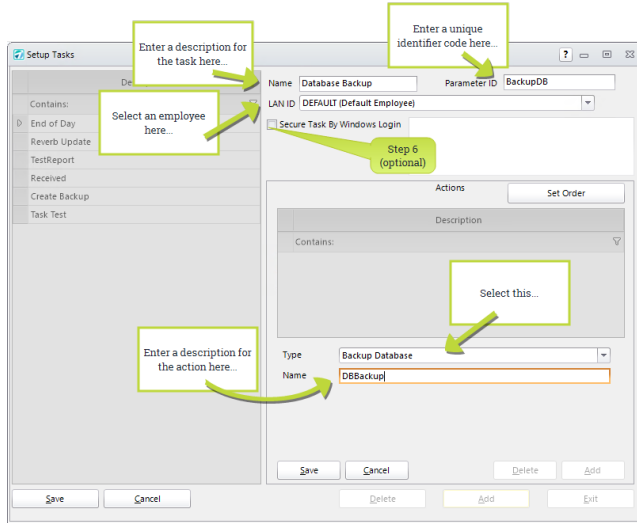
Automatically back up your software

1. On the **Admin** menu, select **Utilities > Setup Tasks**. The **Setup Tasks** window displays.
2. Click **Add** at the bottom of the window.



3. Enter a description for the task in the **Name** box, for example, *Database Backup*.
4. Enter a parameter ID. This must be unique to this task and is used to identify this task in the Windows Task Scheduler.
5. Select the employee responsible for the task in the **LAN ID** box.

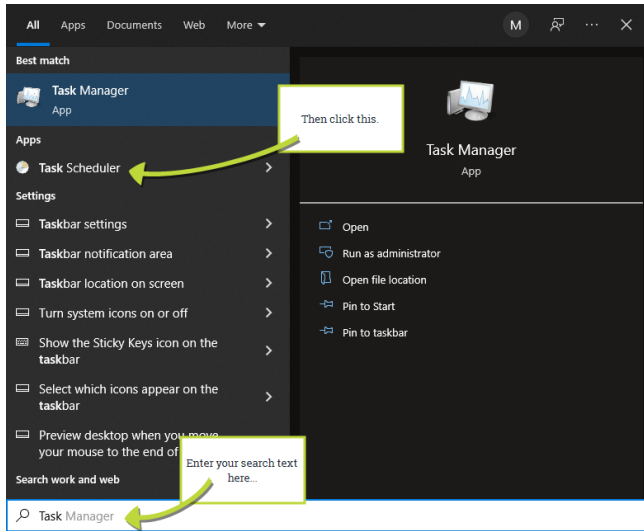
6. If you want to require a Windows login to run the task, select **Secure Task By Windows Login**. This automatically inserts your Windows login information in the adjoining box. Change this if desired.
7. In the Actions section, select **Backup Database** in the **Type** box below the grid.
8. Enter a name for the action in the **Name** box.
9. Click **Save**.



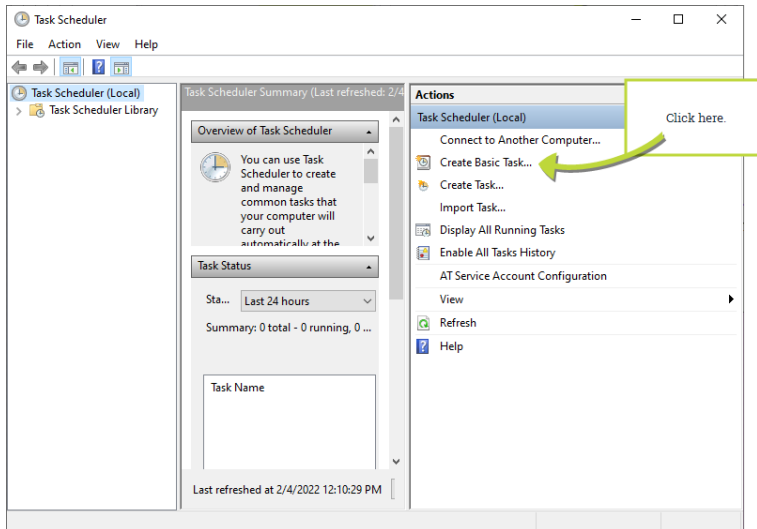
10. Click **Save** at the bottom of the window.
11. If you use Windows 10, click the **Search** icon next to the **Windows** icon at the bottom of your screen. If you use an older version of windows, click the **Windows** icon, then click to search.



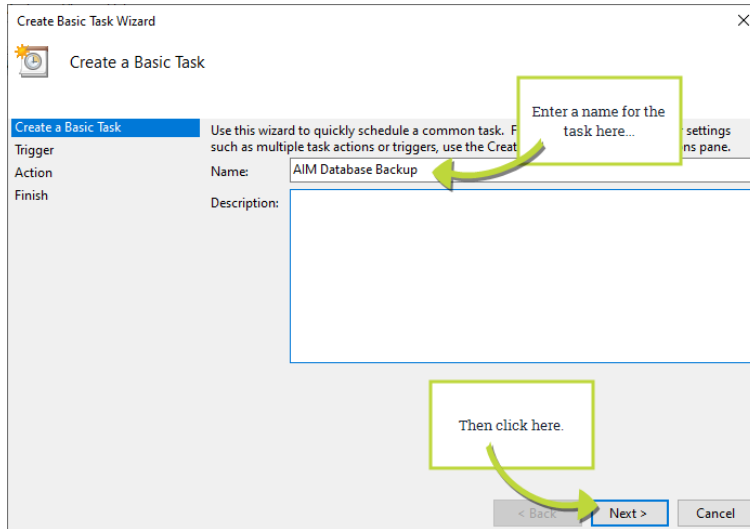
12. Type **Task Scheduler** in the search box.
13. Click to open Task Scheduler.



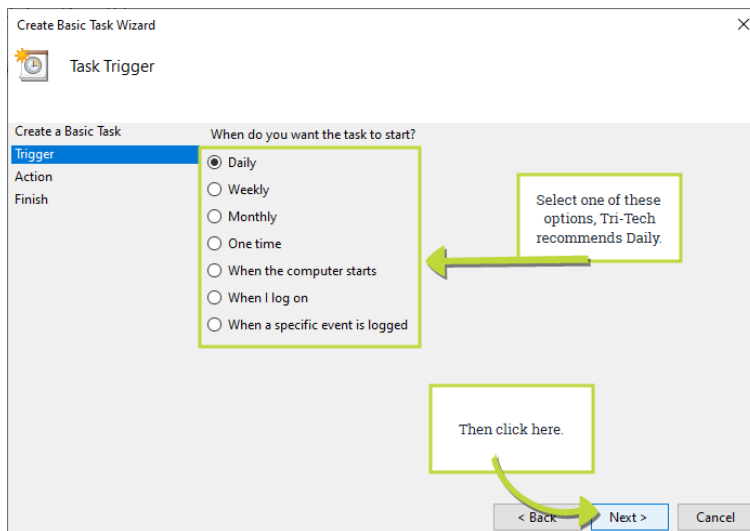
14. Click **Create Basic Task** in the Actions section.



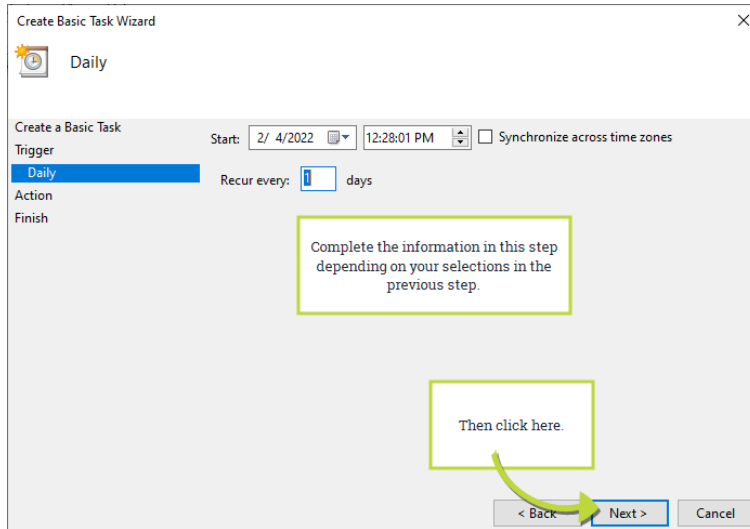
15. Enter a name and optional description for the task, such as *AIM Database Backup*.
16. Click **Next**.



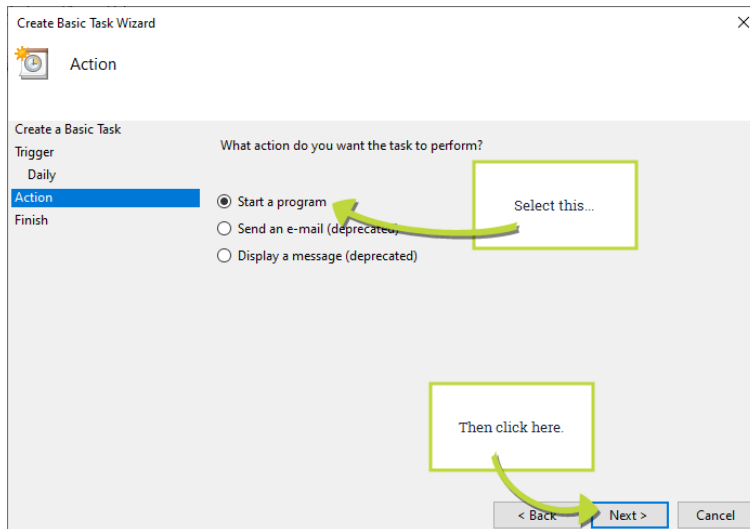
17. Select the frequency for the task. Tri-Tech recommends running a backup daily.
18. Click **Next**.



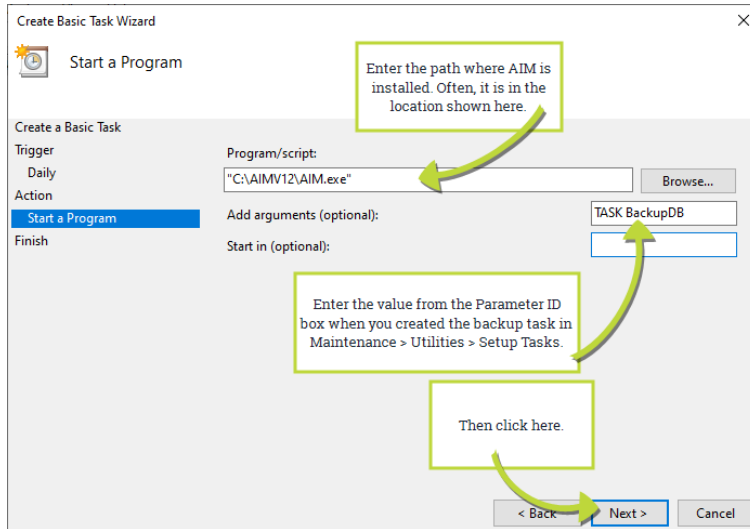
19. Depending on the frequency you selected, enter additional information such as a time or number of days. Then, click **Next**.



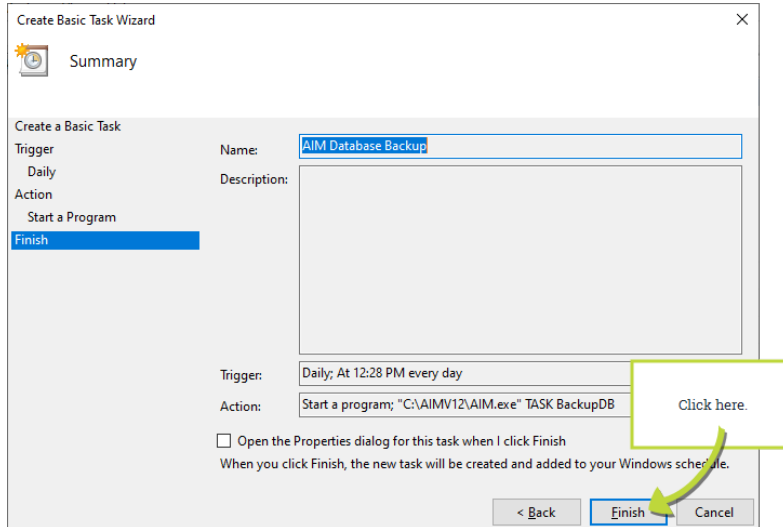
20. Select **Start a program**.
21. Click **Next**.



22. Enter the path to your AIM software. Often, it is located here: C:\AIMV12\AIM.exe.
23. Enter **TASK** <Your Parameter ID from step 4, above>. In our example, *TASK BackupDB*.
24. Click **Next**.



25. Review your settings and click **Finish**. If set up properly, your database backups will occur automatically at the time and frequency set up here.

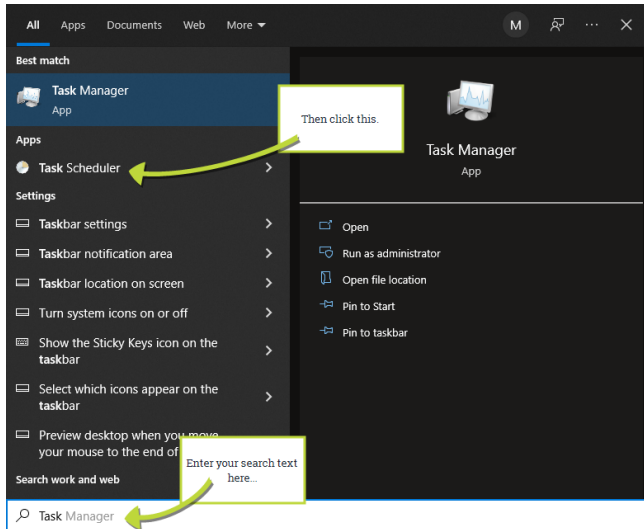


Verify your backup is running

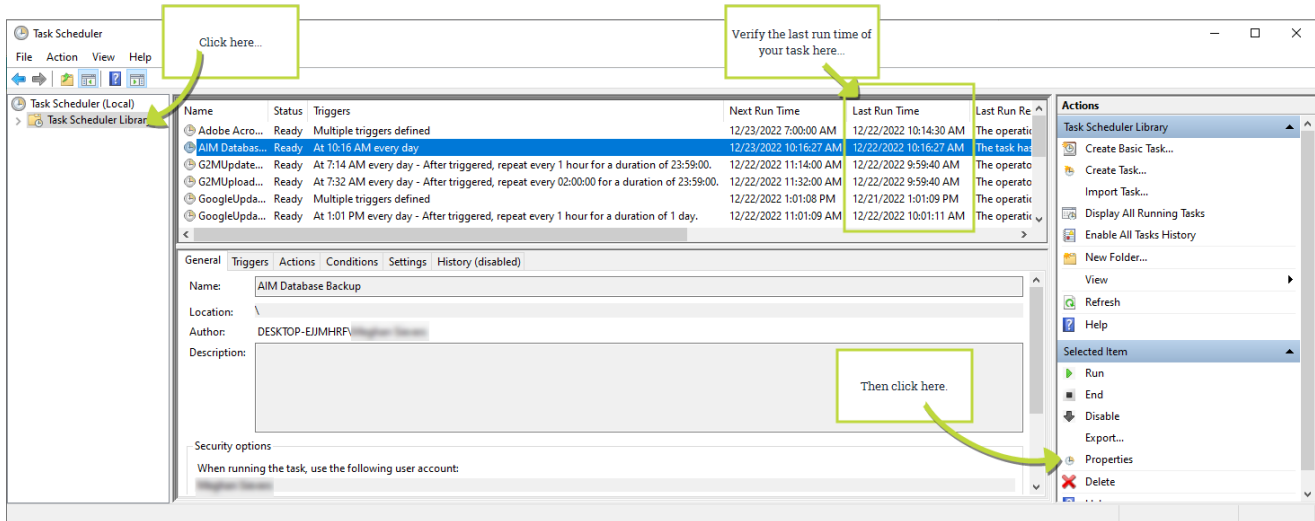
1. If you use Windows 10, click the **Search** icon next to the **Windows** icon at the bottom of your screen. If you use an older version of windows, click the **Windows** icon, then click to search.



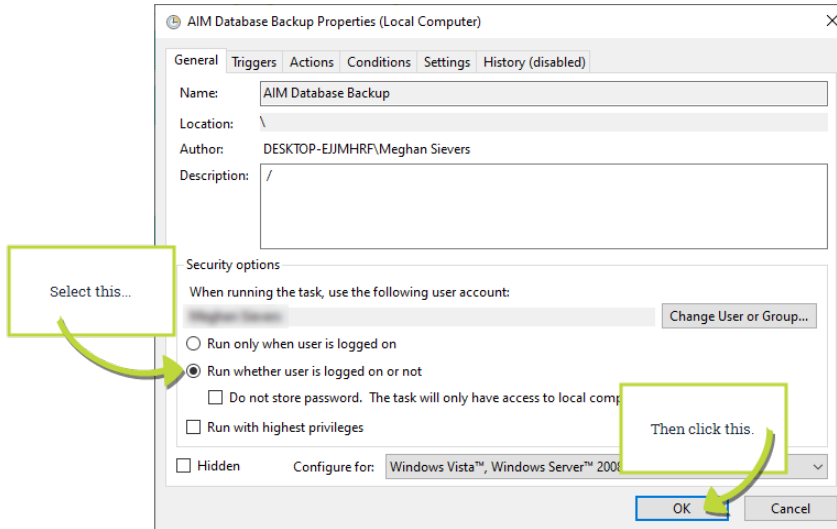
2. Type **Task Scheduler** in the search box.
3. Click to open Task Scheduler.



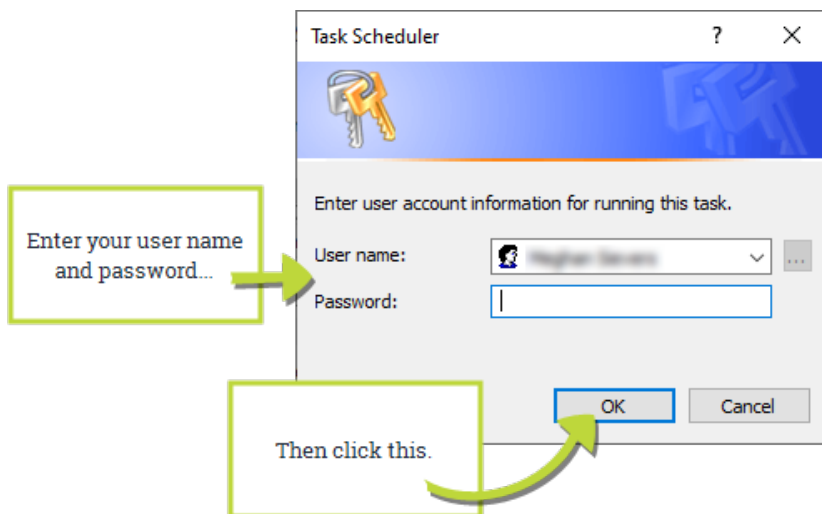
4. Click **Task Scheduler Library** in the left-hand pane.
5. Select your AIM backup task in the upper-middle grid. Verify that it has been running consistently, by looking at the **Last Run Time** column. If it is running consistently, go ahead and close out of task scheduler. If it is not running consistently, complete the remaining steps.
6. Click **Properties** in the far-right column. The **AIM Database Backup Properties** window displays.



7. Select **Run whether user is logged on or not**.
8. Click **OK**. A **Task Scheduler** window displays.



9. Enter your user name and password.
10. Click **OK** to finish the setup. Your backups will now run regardless of a user being logged in.

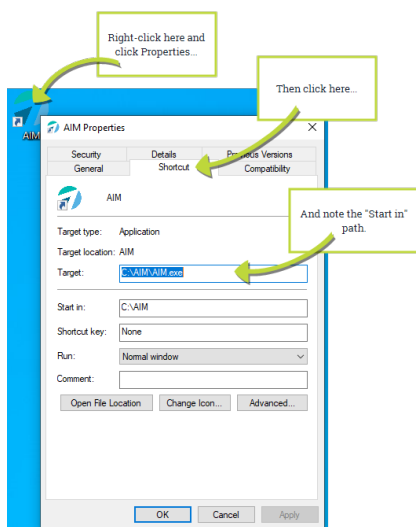


What's my password?

Wondering how to log in to AIM for the first time? Not sure what username or password to use? No problem. The default AIM username is **default** and the default AIM password is **PASSWORD**.

Where is AIM installed?

If you can't remember where you've installed the AIM software, right-click on the desktop shortcut and view the shortcut properties.



Tips and tricks for working in AIM

This section outlines various keyboard shortcuts and other techniques that you can use to make navigating through AIM even quicker.

Alt, Ctrl, and Function keys

Alt, **Ctrl**, and **Function** keys are important aspects of navigating through AIM 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 AIM, 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 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 AIM.

Tab key

Press the **Tab** key to move your cursor between items on AIM 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 **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.

Grids

Grids, or tables, display on many windows in AIM. Grids throughout AIM can be sorted, grouped, or filtered. Information in a grid can be copied to your clipboard or exported to a Microsoft Excel spreadsheet stored on your computer.

For more information on using grids in AIM, refer to the online help.

Keyboard shortcuts

Keyboard shortcuts are ways to access information in AIM 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 AIM functions or perform various actions.

Common Function keys:

F3	Exits point of sale.
F4	Adds the date, time, and your user name to any Notes box.

F5	Opens point of sale. In Contact Management, F5 opens a case or a URL, depending on which you have selected.
F6	F6 in a drop-down or list box will open any relevant search windows. For example, pressing F6 in Category boxes opens Inventory Search, 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. In most pricing fields, such as Retail or Ourprice, F6 opens a Calculate New Price window where you can calculate a new price based on a desired percent of margin or a percent of retail.
F7	Opens the cash drawer. If the Work Stations window is active, F7 updates all workstations with the selected field's current value.
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.)
F12	Saves the current window. Or, if any type of POS transaction, F12 will bring up the Tender menu so that you can complete the transaction.

Alt key

Keyboard shortcuts that use the Alt key are performed in a sequence or as a combination. These keystroke sequences and combinations open menu items or complete a command (such as "clicking" a button). You must be able to see the menu button for which you are using an Alt key sequence in order for it to work. For example, to access options on the Admin menu you would press Alt+d. However, if the Admin menu button is not currently visible to you in AIM, Alt+d will yield different results, such as opening the Daily Posting submenu if the Modules menu was open. Instead, to access an item on the Admin menu when you are not on your Home button menu, you'll use the sequence Alt+5 (5 is the Admin menu's assigned number).

If a keyboard shortcut is written with plus signs, it is a combination shortcut. For example, Alt+E (press Alt and E at the same time) closes various windows throughout AIM. Or, to find another customer while in Contract Full Edit, type Alt+F to "click" the Find button.

If a keyboard shortcut is written with commas, it is a sequence shortcut. For example, Alt+F, Q (press Alt and F followed by Q) opens a Quick Sale if you're on your home menu. If you're currently in Modules > Customer, however, pressing that same combination opens the Calculate Finance Charge Aging window (its sequence is Alt+F).

Alt key sequences and combinations can be visually identified in AIM by locating, then typing, the underlined letters. For example, to open the Admin menu, press Alt+d. To start a backup, you would use the menus Admin > Utilities > Database Backup or press Alt+d, U, B.

Common Alt key sequences are:

Alt+F, Q	Opens the Quick Sale function.
Shift+Alt+L	Signs the current employee out of AIM.
Shift+Alt+X	Closes all open windows in AIM and closes AIM.

Alt+R, C	Opens the Reports > Customer menu.
Alt+M, I, C, A	Opens the Add 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 complete a command (such as "clicking" a button).

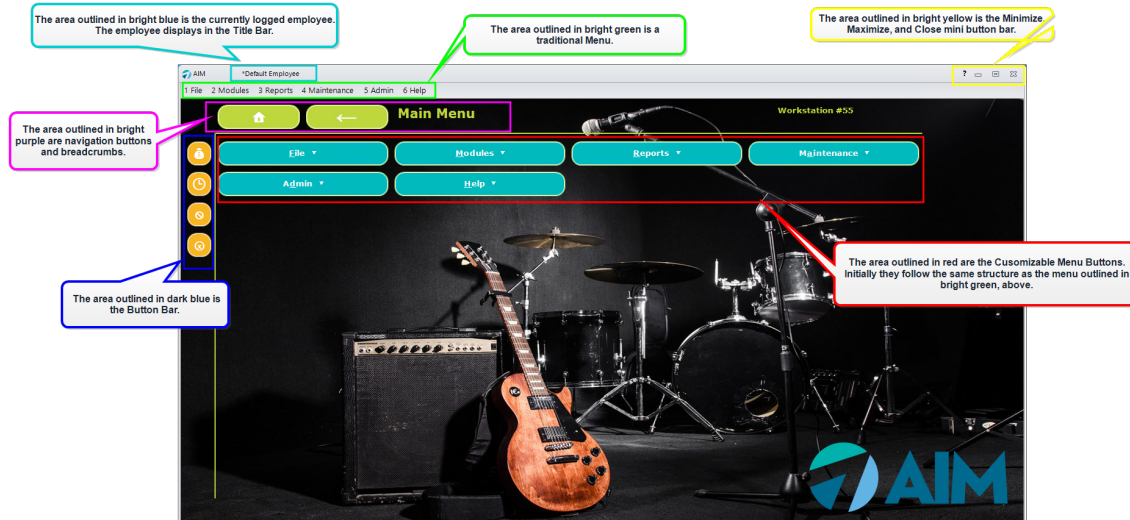
Common Ctrl key combinations:

Ctrl+F2	Searches all menu items. For example, if you are looking for a certain report but can't remember where it is, use this shortcut and enter the report name to identify the menu path. Note: If you are in an active POS transaction when you perform this keyboard shortcut, the search will be only for POS menu buttons.
Ctrl+F10	Opens a window where you can select a window that is currently open in AIM. This works similarly to Alt+Tab in a Windows operating system.

Components of the AIM workspace

The AIM 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. On the very right are **Minimize**, **Maximize**, and **Close** buttons.
- **Menu:** The menu bar is second from the top and includes these options: **File**, **Modules**, **Reports**, **Maintenance**, **Admin**, and **Help**. Each of these is described in detail throughout the online help.
- **Navigation and breadcrumbs:** This area, sandwiched between the menu bar and menu buttons, displays the Home button (return to your home menu buttons), a back navigation button, and your breadcrumbs. Use these to quickly move backward (or to your home set of menu buttons) while you're working.
- **Button bar:** The button bar is left of the workspace. The button bar 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. Those shown in the image below access Point of Sale, start a quick sale, open the cash drawer, and log out of AIM.
- **Menu Buttons:** The menu buttons are at the top of the workspace. Use them to navigate throughout the various modules and tasks available to you in AIM. These buttons are fully customizable in General Maintenance.
- **Workspace:** The workspace is the area below the menu buttons where the AIM windows display when open.



Member Portal options

Member Portal (www.tritechretail.com/t-memberportal.aspx) is a convenient way for customers on a Tri-Tech Maintenance Plan to access important downloads, log and review support requests, review your account information and manage payments, view and sign up for training, and more.

Before you can access any of the following areas you will need to create an account with a valid email address and password. Keep this information handy; you will need it each time you log in to the Member Portal.

Described here are options available to you that are not accessible from [The Help menu](#) in AIM.

Download program updates

Download updates to your AIM software, documentation files, videos, and other miscellaneous files (such as those needed for label printers). Select a file type and click Submit to view matching results. Review the description of each item to determine if there are any special requirements before downloading. For example, the videos page will display at the top in red script what applications are required to view the videos. It will also state what version the video is for in the far right side under "VER". All AIM Version 12.0 videos will have a VER of 12.0. When you're ready, download the item you need by clicking the link in the Filename column.

Make a payment

Need to make a payment to Tri-Tech? Access this area of the Member Portal and select the Pay check box for each payment due. Enter the amount(s) you want to pay, then enter your credit card information. Click Post Payment to make your payment.

View account history

You can view your history of invoices and payments, including support payments, in this area of the Member Portal. Indicate if you want to view only active account history or if you want to view closed history (invoices that have been paid off). Then enter a beginning and ending date range and click Get History.

Sign up for training

Want more personalized training that is offered through webinars and livestreams? Schedule online or in-person training for yourself or your business with Professor Tri-Tech.

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