UPGRADING FROM PIMS-SQL TO PIMS-GOLD

To start, download the "PIMS-Gold Server" and "PIMS-Gold Client" folders over to your new MAIN server. Get your 4D v14 licenses handy.

In your current system, backup your Users/Groups in PIMS Preferences.

Quit the PIMS-SQL server.

Make a copy of your current Datafile (.4dd and .4Dindx) into a new folder called something like "PIMS-Gold Datafile".

If you've modified any of your HTML templates (Invoice, Purchase Order, etc.) found in your "PIMS HTML Templates" folders, then copy that folder into the new "PIMS-Gold Server" folder replacing the one that's there. Try and use the ones that Shipped with PIMS-Gold if you can. These Templates will be loaded into the Datafile, where they will be accessible to all Users of that server. The folders aren't used anymore. More about that later.

Now install/boot the new PIMS-Gold Server, and select your copied datafile. It will need to rebuild your entire index structure ("Indexing").

While indexing, you'll be prompted to enter your new 4D Licensing. This is the same process as the last 4D (v12, PIMS-SQL). You'll need those Licenses and your 4D User ID and Password. Enter them, by following the prompts. You'll need to enter the Server license first, and then the additional Users next.

Once the indexing is done and your Licenses are in, <u>quit the server</u> and then boot it back up. After two minutes, tie the PIMS Client you installed on the Server machine into the PIMS Server. Once it's up, restore the Users/Groups. Now go to the Import/Export Module, and run the routine called "Update From PIMS-SQL To PIMS-Gold…" under the "Previous-PIMS-Update" menu:
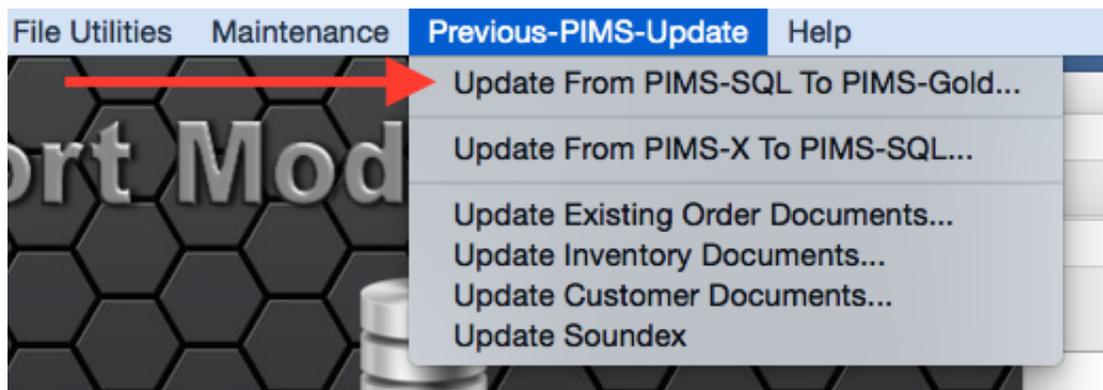
It will take a few minutes to complete.

Once this is finished, select "Update Users/Modules From EDC…" from the File menu:
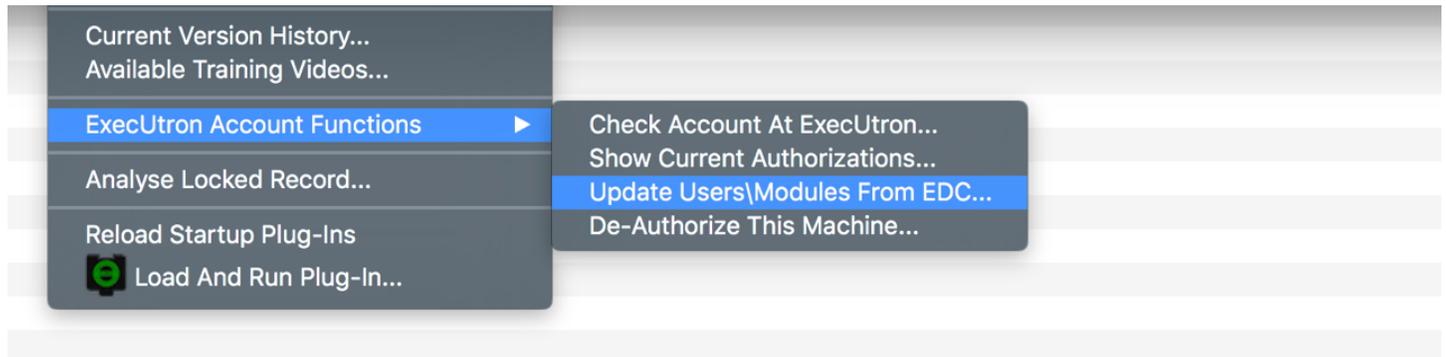
This will insure your configuration matches the new profile ExecUtron has created for you.

Remember we told you that the HTML templates were loaded into the Datafile? We'll now you need to check. Go to the "HTML Templates" menu and select "List All Templates":
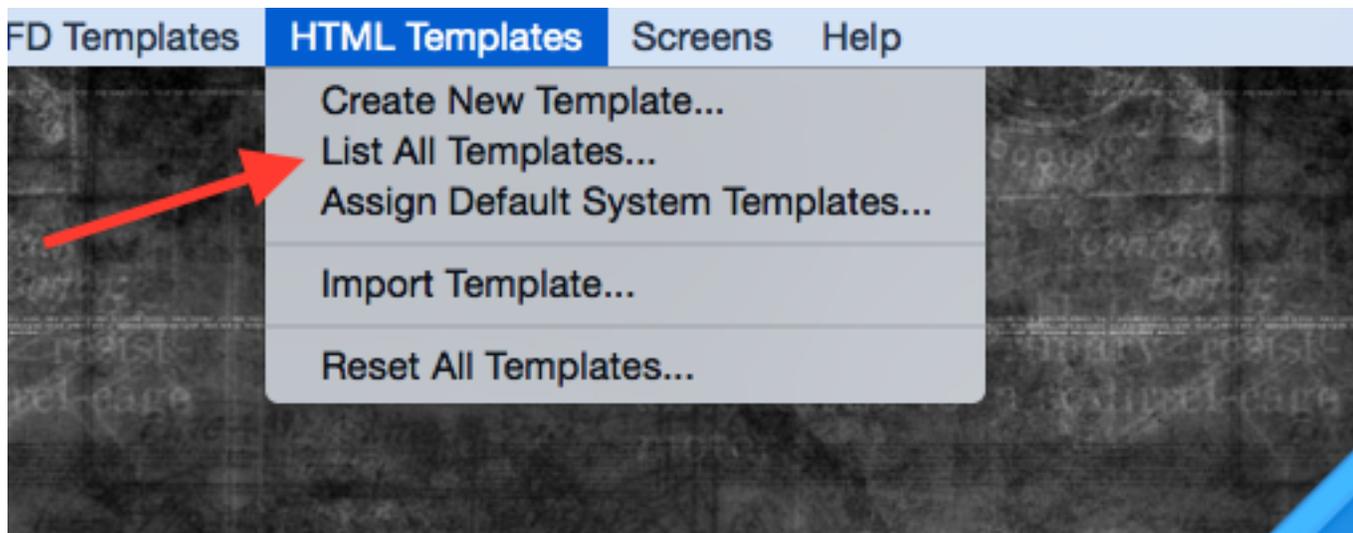
You just need to make sure they're listed.

Now, select "Assign Default System Templates". It should look like this:

PIMS FUNCTION ^	CURRENT TEMPLATE	AVAILABLE HTML TEMPLATES: ^
Invoice	Invoice.html	Customer Items Received.html
Salesorder	Salesorder.html	Invoice.html
Quote	Quote.html	PurchaseOrder.html
Worksheet	Workorder.html	Quote.html
Purchase Order	PurchaseOrder.html	RentalReservation.html
Rental Reservation	RentalReservation.html	Salesorder.html
Customer Items Received	Customer Items Received.html	Statement.html
Statement	Statement.html	TEST
		Workorder.html

Save   Cancel

This tells the server which HTML Template to use with which PIMS e-mailing function. You simply drag a Template on the right over to a function on the left. For now, this default is fine. You'd only change things up as you make more templates. This is system wide, and not terminal specific like the last version. These are NOT custom User templates used for SRO and Customer mailings. Those are where they were in the last version.

That's it!