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# MAGNA COMPUTER INSTALLATION OUTLINE

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In order to provide your corporation with a general guideline and requirements necessary to install your system, we are pleased to be able to provide you with this general guideline.

Within this document you will be advised of the procedures and steps necessary to install and configure the Marketing and Sales software for your resort. The time allocated for each function is only an estimation, providing additional trouble-shooting is not required.

This document is separated into the following 3 sections:

**Installation:**

This section will cover Mandatory requirements for each installation. The covered topics range from the Main Frame (Computer) and the accessory components to the software installations and configurations per your order.

**Training:**

This section will describe the items to be covered in the training process. This document will be useful in the determination of the time allotted and the personnel required to complete each program.

**Special Requirements:**

This section will be added at the end of the two main functions illustrated above. Any special requirements such as customization, conversion(s), membership requirements and any other miscellaneous requests by your company will be contained with this addendum to the regular structure.

# PRIOR TO ARRIVAL:

## •ORDER HARDWARE & OPERATING SYSTEM STANDARDS

- Order all components from the various outside sources.
- Receive and check-off all hardware received.
- Compile hardware sign-off checksheet for Main Street Inn Resort.
- Order O/S and any additional third party software as per purchase agreement.
- Compile check-off sheet for software received.

## •COMPILE DOCUMENTATION

- Print and encase all current documentation per each module ordered.
- Review available documentation.
- Prepare documentation sign-off checksheet.

## •INSTALL AND TEST HARDWARE (DRIVES, MEMORY, CARDS, ETC...)

- Boot up in DOS to configure I/O, device standards, BUS, memory, etc...
- Create serial and parallel ports, configure and test.

## •INSTALL OPERATING SYSTEM

- Configure Kernel Operating defaults.
- Allocate Unix addresses, format drives, trouble-shoot boot up.
- Set Boot defaults.
- Configure Parallel and Serial (Unix) addresses and I/O.
- Re-link Kernel operations.
- Trouble-shoot Boot Parameters.
- Set system standards and defaults.

## •INSTALL AND TEST COROLLARY CARDS (Must be done after installation of Unix O/S).

- Configure Address, Relink Kernel Parameters.
- Configure all available ports (set baud rates, stop bits, etc...).
- Test flow control and login abilities.

## •INSTALL THIRD PARTY SOFTWARE (Backup\_Edge, X-Windows, Office Portfolio, E-mail, Pro Comm, Basic Runtime, etc...)

- Create Filesystem Recovery and Boot Diskettes.
- Configure Backup parameters
- Configure and test X-Windows.
- Set pseudo port abilities.
- Configure uucp connections to E-mail.
- Test E-mail functions.
- Install Modem (Configure dial-out capability)
- Test uucp connection and protocol.

**•DOWNLOAD MAGNA SOFTWARE TO NEW CPU**

- Install all program source files.
- Install all blank data files.
- Set Company parameters and defaults.
- Set variables and start-up scripts.
- Install utilities.
- Serialize executables.
- Test functionality.

**•SEND TESTED HARDWARE TO RESORT**

- Ship and document each parcel.
- Send Content List of each parcel to Sonya, including tracking numbers.

**•CREATE USER TRAINING CHECKLISTS**

- Compile Individual department and program training checksheet(s), for managerial staff.
- Compile General Training Sign-Off for All programs.

**Estimation of Time: 7 to 10 days to complete**

# **SPECIAL REQUESTS**

## **ARRIVAL TO LOCATION:**

### **•INSTALL CPU AT DESIGNATED LOCATION**

- Connect all peripheral devices.
- Boot up system, trouble-shoot.
- Designate and map device locations.

### **•INSTALL CONNECTION STATIONS AND 8X4 TERMINAL CONCENTRATOR (If Applicable)**

- Install Concentrator Card (Main Frame)
- Configure address and re-link kernel.
- Test access and login abilities.
- Install cabling and connections.
- Configure system ports.
- Connect a terminal and printer (Setting default protocol).
- Configure and test system tty and dev files.
- Test login and print abilities for each station.

### **•INSTALL TERMINALS AT VARIOUS LOCATIONS**

- Install remaining workstations.
- Configure each device in system and at location (Baud Rates, stop bits, etc...).
- Test login access and flow control.

### **•INSTALL AND CONFIGURE NETWORK PRINTERS**

- Configure system printer interface files.
- Set user printer defaults.
- Enable and assign port address for each printer.
- Test output (Cat to device(s), spool request(s)).

### **•INSTALL AND CONFIGURE PC CONNECTION SOFTWARE (If Applicable)**

- Install Reflections software on each PC.
- Set configurations for each PC.
- Test login abilities on each station.
- Test function keys and WP on each station.

### **•SET PROGRAM DEFAULTS**

- Market Sources, Sales people, Premiums, etc...
- (See Training Overview For Details)

### **•CREATE USER DIRECTORIES**

- Set login defaults.
- Set Permissions.
- Copy any required files from old system.
- Set program & menu permissions.
- Create individual menu(s).
- Test login abilities.

**Estimation of Time: 5 to 7 days to complete.**

**•SET UP AND PROGRAM AUTOMATIC CONTRACT DOCUMENTS**

- Set up Master File containing list of all documents.
- Set Master variables appointing which docs to print with which inventory or type of sale.
- Set function key access to documents.
- Create individual documents, align variables, test print abilities.
- Set up print menu to include all documents.
- Merge any contract letters at time of sale.

**Estimation of Time: 7 to 10 days to complete.  
This estimation is for (1) set of documents only**

**•SET UP AND PROGRAM MERGE LETTERS FOR EACH DEPARTMENT**

- Obtain individual letters or documents from each department.
- Create merge codes and Code variables to merge documents with software.
- Set function key access.
- Create text file (letter text).
- Create Merge Script file, include in program menu(s).
- Set automatic defaults from software to data file (data text).
- Test functionality of merge letters.

**Estimation of Time: 3-4 days to complete.**

**•TRAIN MAGNA SALES AND MARKETING SOFTWARE**

(See Training Overview for Details)

**•ON-LINE STARTUP ASSISTANCE**

Availability for questions and Assistance with Data procedures.

**Estimation of Time: 2-3 Days**

**•SYSTEM ADMINISTRATION TRAINING**

(See Training Overview For Details)

## **SPECIAL REQUESTS:**

# MAGNAWARE SOFTWARE TRAINING

This outline is arranged in System Flow Of Usage. This method is best in implementation and training, in order to address any defaults required, and the integrated modules.

**•PREMIUM INVENTORY CONTROL - EMPLOYEE MAINTENANCE - INVENTORY MAINTENANCE - MARKET SOURCE MAINTENANCE - EMPLOYEE COMPENSATION RECORDS:**

We will set up Company defaults for each item listed above, which is required to automate the system. Only the managers of the respective departments should be included in this training, as each of these functions should be guarded.

We will focus on Adding records, Editing & Changing Records, Terminating or Expiring Records, Checking Information, Reports, and an overview of the programs involved with trouble-shooting errors.

**Estimation of time: 1 day for all.**

**•TELEMARKETING & LEAD MANAGEMENT:**

Overview of Solicitor, Market Source Codes & Types

Lead Entry & Edit.

Function Keys.

Booking Vacations.

Confirm & Cancellations.

Add a text letter for merge capabilities.

Automated Letter(s) printing and selections.

Overview of Terms & Conditions.

Hotel Selection and Cost Defaults for Mini Vacs.

Hotel Reporting.

Lead Cards & Arrival Reports.

E-Mail and other accessories.

Unix Utilities.

**Estimation of time: 1 - 1 1/2 days**

## •UPREGISTRATION & GIFTING:

Overview of Telemarketing and Booking Leads and how it effects Upreg.  
Telemarketing Arrival reports.  
Registration Entry.  
Save, Print & Reprinting of Survey Sheets.  
Sales People Wheel (Set-up Criteria, Edit, Printing)  
Placing On-Tour  
Screen Reporting (Here, Waiting, On\_Tour, Toured, Summary)  
Manifest Report & Corrections.  
Upregistration Reports.  
Taking Off Tour & Gifting.  
Gifting with Automated Premiums.  
Chargebacks & Corrections.  
Gift Summary and Variance Reports.  
Daily Procedures (Starting shifts, running reports, setting daily defaults).  
Corrections & Adjustments.  
Posting Daily Activity & End Of Shift Procedures.  
Function Keys.  
E-Mail & Other Accessory Software.  
Unix Utilities.

**Estimation of time: 1 - 1 1/2 days**

**•CONTRACT PRINTING:**

Overview of Upregistration & Gifting (Integration standards)  
Overview of Salespeople Numbers and Commission Defaults.  
Contract Default Values (Overview of Previously Set Defaults as in CCosts, Exchange Rates, etc...)  
Daily Activities and Procedures.  
Matching Survey sheet & Data Requirements.  
Inventory Sold Report.  
Addition Full-Down Contract (Focus on Field Requirements)  
Addition of Pending Contract (Focus on Pending Requirements and Update Procedures).  
Printing of Documents (All & Partial)  
Editing, Changing, Re-Printing of Contracts.  
Cancellations with an "X" status.  
Daily Totals Reports & Requirements.  
Amortization Schedule.  
Unlimited Notes Access.  
Function Keys Overview.  
Contract Cancellations Overview.  
TRW Reporting.  
E-Mail and other accessory software.  
Unix Utilities

**Estimation of time: 1 - 1 1/2 days**

**•CONTRACT AND ADMINISTRATIVE REPORTING:**

**We will set the values and print each type. Focus will be placed on the information available on each type of report, and changing the values for individual requirements.**

Contract Report (Setting different values as in dates, status, format, etc...)  
(This report has multiple uses and settings)

Total SalesPerson's Report (Setting different values as in dates, status, format, etc...)

Market Source Recap (Setting different values and information)

Unit Comparison Report

Sales Generation Report (Setting criteria for individual requirements).

Total Sales Line Report

OPC Manifests

Customized Administrative Reports

**Estimation of time: 1 day**

**•CONTRACT ADMINISTRATION:**

Closing Procedures (Recording at Courthouse, etc...)

Adding Additional DP Monies.

Transfer Pending to Full-Down Contracts.

Verification Preparations for Commissions, recording, mortgages.

Action Notice Procedures (NSF Checks, NON-Payments, Foreclosures, Cancellations, Rescissions, etc...) Additionally cover how this integrates with Mortgages, Maintenance, etc...

Reports to verify information & Status Tracking.

Unlimited Notes (Entry and Edit)

Function Keys.

E-Mail and other accessory software.

Unix Utilities.

**Estimation of time: 1 day**

**•SALES COMMISSION PAYROLL:**

Overview of Contract Screens (What fields effect Commissions & Verifying Information)

Overview of Action Notices, Cancellations, etc...

Commission Codes Types and Ratings.

Verification Reports (Procedure to check/edit Contracts that are "Good Business").

Employee Rate Maintenance.

Reserves, Credits, Chargebacks, Spiffs.

Half Check Reports & Verification.

American Express & NSF Entries/Edit.

Half Credit Procedures and Posting.

Full Credit Procedures and Posting.

Statement Menu Options (In Detail)

Transaction Adjustments.

Closing Period.

Trouble-shooting

Unlimited Notes

Function Keys

E-Mail & other accessory software.

Unix Utilities.

**Estimation of time: 1 day**

**•OPC PAYROLL:**

Overview of Up-Registration, Gifting & Chargebacks.

Review of Market Sources and Employee Maintenance.

Commission Codes.

Report Verifications.

OPC EDIT (1st step to weekly OPC payroll).

Weekly Pre-Payroll Report.

Adjusting and verifying commissions.

Manual Entries & Adjustments (License charges, Loan Payments, Advances, Insurance, Funds Transfer, Over-rides, Salaried, Gift-Unit-Spiff Bonuses, Chargebacks, Crediting Deficits, Transaction Corrections.

Payroll Reporting.

Closing & Re-Opening Period (Review and Procedures).

Function Keys.

E-Mail & Other accessory software.

Unix Utilities.

**Estimation of time: 1 - 1 1/2 days**

## •MORTGAGE RECEIVABLES:

Contract Processing Overview.

Account Look-up and entries (Adjustments, credits, charges, etc...)

American Express Account(s) Edit/Verify.

Reports Menu (Monthly Account Listing, Current Status Detail, Transaction Reports,  
Uninitialized Accounts, Receivable Reports, etc...)

Periodic & Manual Billings

Automated Letter Printing and Maintenance

Bank Code Maintenance

ACH Generation / Maintenance / Procedures

Funding Entries

1098 Reporting

Amortization Schedule Overview

Payoff Calculation

Principle & Interest Evaluation

Year End Statistics

Customer Statements & Automated Labels

Function Keys

E-Mail & other accessory software

Unix Utilities

## **FUNDINGS:**

Contract Overview  
Reporting & Verifications  
Default Values for selection per each Lending Institution  
Ownership Code Maintenance and overview  
Automated Contract Selection & Verifications  
Transmittal (Codes & Reporting)  
Lender Acceptance Procedures  
All Funded, Not Funded, Selected to Fund and other valuable reports.

**Estimation of time: 1 day**

## **MAINTENANCE FEES / TAXES / OWNER RECEIVABLES:**

Overview of current billing procedures.  
Contract verifications.  
Bill Code Maintenance and overview.  
Generation of Maintenance Fees.  
Open Transactions Item File.  
Verification of Transactions.  
Automated Letters, Statements and Invoices.  
Apply To Numbers (Procedures and overview).  
Payment Applications.  
Adjustments, credits and corrections.  
Tax Generations.  
Late Fee Charges.  
Miscellaneous Charges.  
Reminders and Late Letters.

**Estimation of time: 1 1/2 - 2 full days.**

## **SYSTEM ADMINISTRATION:**

VI (Visual Unix Editor)  
Creating Users (Procedure and implementation)  
Assigning Permissions (Unix) with Troubleshooting.  
Menu Construction.  
Directory & File Hierarchy and access.  
Unix Administration.  
System Statistics.  
Troubleshooting hardware / software.  
Print spooler overview and statistics.  
Killing user jobs. (Stuck Terminals, run away processes, etc...)  
User passwords.  
Canceling print requests.  
Copying and deleting files.  
Reporting errors to Magna.  
Backup archiving (Procedures and implementation).  
System Shutdown Procedures.  
Cron Reporting.  
Lead in script files.  
Magna file hierarchy and variable determination.  
Dialing in and out of system.  
Configurations required for Word Perfect, Lotus and other 3rd party software.  
Additional software installation.

**Estimation of time: 3-5 days.**