basic

SOFTWARE SYSTEMS

PRODUCT BROCHURE

SOFTWARE

Our business system is designed to be modular, which means, you can choose as many or as little of the software modules that we provide. Our solutions are customizable for your business needs.

Parts Inventory

One of the keys to success in any dealership involves managing your parts inventory. Be empowered in your dealership with the management solution you need for parts, orders and results you need to make daily decisions.

Features

- Access each location's inventory and transfer
- Extensive look-up capabilities (part #, category, manufacturer, bin, description, etc.)
- Generate stock or return orders based on sales, season, bin trips, categories or part status
- Extensive manufacturer parts price books available for auto-processing with PBConnect
- Integrated order generation in service and counter sales
- Unlimited sales and quantity history
- Track profitability and critical data
- Sales reports by part, salesperson, customer or manufacturer
- Customer previous part purchases accessible
- Up to three bin locations
- Core associations
- Track your lost sales
- Multiple levels of custom pricing markups
- Retail markup can be percentage markup or profit margin
- Ordering and selling in units of measure
- Customized stored order profiling saving you time
- Associate part fees and alternate parts
- Build and manage picklists and kits
- Setup promotional discount periods for your next special
- Associate photos and documents with any part
- Custom design your own reports
- Control sales tax at the manufacturer, category or part level
- Freeze cost and price at the part level from any manufacturer price changes
- Maintenance tools available (i.e. part number changes, price changes, bin changes, return codes, obsolete parts, etc.)
- Use existing manufacturer bar code or generate your own
- Add parts from the price book to control accuracy
- Know your inventory values by product line
- Extensive reporting capabilities including yearly comparison
- Add notes for parts and manufacturers
- Immediate inventory adjustments at point-of-sale
- Real-time physical inventory optional using our Mobile PC
- Integrated Ordering Interfaces with Manufacturer Partners
- Integrated Catalog Interfaces with Manufacturer Partners
- Security and audit trails

Point-of-Sale Invoicing

The Point-of-Sale Invoicing module goes beyond the basics of just selling parts. Integrate with the inventory modules for availability. Review previous customer purchases to ensure you are selling them the correct item. Simplify the sales process bringing accuracy and speed at the counter with the use of a bar code scanner.

Features

- Create transactions for serialized equipment items and parts on the same invoice
- Move from invoice to integrated modules (parts, equipment, customers, orders, etc.)
- Move from counter invoice to service work orders
- Multiple levels of pricing
- Search for a customer by account number, name, phone number and location
- Search for a part by part number, manufacturer, category, descriptions, bin or memo
- Control sales tax on individual transactions as needed
- Sell inventory and non-inventory items on the same invoice
- Automatically relieves parts inventory
- Customer notifications at point-of-sale from accounting
- Bill to/ship to detail
- Alternate part listing available
- Multiple sales tax levels
- Track your parts lost sales
- View item details for parts and equipment
- Process sale with trade-in serialized equipment items and automatically add to inventory
- Bar code scanners can be used for accuracy and efficiency
- Integrated credit card processing for public cards available
- Integrated manufacturer vertical credit cards available
- Create a quote and convert to an invoice or retain it for later use
- Add virtually unlimited comments to any invoice with ease
- Imbedded customer and part number search capability
- Add customer accounts and parts as needed
- Change a customer's contact information, notes, etc.
- Display customer balances when initiating payment
- Remind your employees to capture critical data such as email address, phone, etc.
- Display customer over limit and past due warning messages
- Create and track your customer orders from the point-of-sale
- Maintain your inventory stock by adding to orders as your quantity reduces
- Custom retail pricing available for specific customers
- Create custom sales transactions to meet your needs
- Receive payments for customer accounts
- Take deposits for your sales and define pre-payments for part orders
- Capture signatures for all sales or selected sales
- Create custom method of payments
- Split payment using multiple methods of payments
- Quick verification of profitability if needed for part sales
- Purchase order field can be required and used for searches
- Re-print invoices at any time
- Customized printed invoices
- Print full size invoice or use receipt printer
- Unlimited invoice history
- Take advantage of bar codes for fast sale
- Warning and/or prevention if selling below cost

Customers | Receivables

Managing customer accounts is crucial to your business. We feel it is important for you not to miss out on any customer activity. We've provided a module to assist you with not only successfully running your Receivables department, but also assist you in storing important information. The extensive profile is extremely beneficial for your marketing efforts and includes valuable contact information and an extensive note option.

Features

- Extensive customer profiling
- Customer Notes and Categories
- Create up to 36 customizable fields
- Reprint all customer sales invoices
- Unlimited purchase history
- Unlimited contact information
- Generate finance charges
- Include invoice with statements
- Search for a customer by account number, name, phone number and location
- View or add customer owned equipment with integrated module
- Auditing
- Customized statements
- Customer purchase report
- Account payment manager
- Display a breakout of customer balances
- Have multiple ship-to addresses
- Past Due Balance Report (30, 60, 90 Day)
- Open Item and/or Balance Forward
- Customize your own reports
- Print mailing labels for customized searches
- Multiple contact information for each account
- Identify prospects and customers
- Maintain ship to information
- Multiple custom retail pricing per customer available
- Year-To-Date sales totals for counter, service, equipment and rentals
- Open item by individual customer
- Marketing Manager
- Statement Manager
- Customer Portal

Equipment Inventory

The Equipment Inventory module integrates with our other software modules allowing you to manage your inventory efficiently. Track the cost, manage flooring, project profit and much more. Also use the Equipment Inventory module with our Rental module to manage your rental equipment.

Features

- Quick search and sort inventory look-ups
- Internal control so asset values are always accurate
- Associate photos and documents with any item
- Equipment receipting made easy
- Quick quotes made easy
- Unlimited sales history
- Unlimited detail transaction history
- Unlimited customer owned equipment tracking
- View open work orders at any time
- Keep track of a book cost on equipment inventory, even after it has been sold
- Auditing
- Trade-ins made easy
- Over allowance options
- Retail markup option
- Service history access
- Salesperson price list
- Salesperson commission report
- Receipt as a group or individual item
- Bar code your equipment with outdoor labels
- Conduct physical inventory using our data collection device (optional)
- Store last major and minor service repair dates/usage
- Projected profit before and after the sale is always available for any item
- Unlimited lines for descriptive information of memos and specifications for each item
- Identify memos on any item to print on the invoice or salesperson price list
- Report used equipment by salesperson
- Maintenance tools available (i.e. stock number change, account number change, over-allowance, etc.)

Sales CRM Portal

Empower your sales team to use this valuable mobile solution to access critical data needs for customers and equipment.

Features

- See account information for customers and prospects
    - Account details
    - Contacts
    - Sales notes
    - Accounting notes
    - Owned equipment and work orders
    - Parts purchased
    - Opportunties
    - Quotes
    - Activities
    - Map and directions
- Management can set goals for the sales team and see activity
- Salesperson login will see goals set for them with actual equipment sales and forecase charts available with drill-down
- Rental equipment sales option for charts available
- Track sales opportunities and related activities
- Create quick quotes to get specifications to the prospective buyer
- Create details quotes including:
    - Discounts/ rebates
    - Programs
    - Indicate trade and input appraisal vaules
    - Other fees
    - Service request and sales service notes
    - Non-inventory item entry allowed
    - Capture signature when finalizing quote
    - View and email quotes
- Select to created a Sales Work Order with service instruction when sale closes
- Enter non-inventory items
- Create Purchase Order record for final sale
- Create sales work order for final sale
- Access Equipment Inventory and images stored
- Add images to Equipment Inventory taken with your mobile device
- Access Parts Inventory
- Recent actions
- Quick access from activity to account and opportunity

Service Shop

Use the Service Shop module to manage your shop, technicians and labor to increase your profits. Use the integrated time clock option to ensure your labor is written to your work orders without requiring additional entry time.

Features

- Time Card / Time Clock
- Automatic shop supplies can be added to the work order
- View or add customer owned equipment
- Set up flat-rate labor codes or use integrated manufacturer service rates
- Track all facets of shop operation and maintain control of shop profitability
- Unlimited service invoice history
- Internal and warranty work orders made easy
- Create an estimate and convert to an invoice or retain it for later use
- Receive deposits for service jobs
- Retail pricing for parts sold through service can have additional percentage
- Print bar codes on invoices
- Print technician id badges
- Have multiple segments per service job
- Use segment types to review service job performance
- Track all labor and assist in identifying non-productive areas
- Track major and minor repairs
- Track technician and shop productivity
- Work order technician assignment
- Track job location on the work order
- Assign date work order is to be completed
- Technician schedule reports
- Time clocked can be written automatically to work order
- Control tax on individual transactions as needed
- Display customer balances when initiating payment
- Multiple levels of pricing
- Place parts on order for the customer
- Report open work orders for review
- Report on percentage of work done vs. hours worked
- Post of work in progress available
- Auditing

Purchase Order

Purchase Order will allow you to manage all your company's purchases from request to receipting. This integrated solution will allow you to create your company's items list as well as associated values for departments, tax codes, categories, etc. You will be able to create any item desired including but not limited to: Equipment, Computers, Office Supplies, Fixed Assets, etc. and all applicable fields provided based on the type of item.

Features

- Employee enters a request for purchase
- The program will check to see if employee is allowed to purchase
- The program will check to see if employee requires a manager's approval and/or if the purchase is within purchase limits
- Manager or appointed person approves purchase when required
- Employee and/or manager can see items approve
- Purchase Agent finalizes and completes purchase
- Purchase Agent or appointed person marks received
- Employee and/or manager can see items received
- Purchase order number auto generates with prefix option
- Track items by store
- Allows for multiple items per purchase order
- Print Purchase Orders
- Repeat purchase order to make repetitive purchases easier
- Review past purchases and compare previous pricing or number of times purchased
- Search / inquiry / reporting capabilities
- Track major and minor repairs
- Audits of changes made to purchase orders
- Access Purchase Order or items from Equipment Receipting and Accounts Payables for quick entry
- Launch Accounts Payables Invoice Manager from Purchase Order once Purchase Agent marks finalized
- Associated purchase orders will be accessible from the records created therein

General Ledger

The key to running a business is staying on top of your company's financial status. The General Ledger module gives you the ability to keep track of all of your company's financial dealings including department budgets.

Features

- Single or multiple corporations
- Divisions and departmentalized operations can be defined
- Complete audit trails through various reports
- Unlimited accounting transaction history
- Financial reports for budget needs
- Report profit and loss
- Easy to use chart of accounts
- Start your new fiscal year within minutes
- Switch fiscal year to make your auditor adjustments
- Reports to help you audit all accounting transactions by account or journal number
- Flash report
- Cash flow report
- Create recurring entries
- Setup budgets for report comparison

Accounts Payable

The success of an Accounts Payable department is to know what you owe, to whom and when at all times. Using this module will give you the edge needed to run this department successfully, allowing you to provide management with projections for cash requirements as well as taking discounts earned for paying invoices early.

Features

- Easy to use invoice manager
- Check on demand
- Bank reconciliation
- Report the cash requirements to management
- Run outstanding payments report that are reaching maturity
- Print checks in multiple formats
- Unlimited paid invoice history
- Default liability and expense accounts for any vendor
- Default routine discount and due dates for any vendor
- Expedite, hold or create recurring invoices
- Print mailing labels / 1099 Forms
- Void and record unusable checks

Payroll

Manage your employees and payroll with the Payroll module. Integrate with the Accounts Receivable module to provide optional payroll deductions for employees' receivable account.

Features

- Flexible while maintaining tight controls on employee records
- Departmentalized payroll breakdown available
- Weekly/monthly summaries for tax deposits
- Menu options in order of events for a typical pay period
- Automatic tax calculations for federal and up to four states
- Overrides tax calculation or deductions if needed
- Mix hourly and salaried employees time records for same pay period
- Reprint previous pay period reports
- W2 forms printed at year end
- Quarterly reports for 941 filers
- Benefits register
- Payroll check and stub printing
- Up to ten voluntary deductions with varying deduction dates
- Payroll deduction for employees' Accounts Receivable account

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Fixed Assets

The Fixed Assets module allows you to calculate monthly depreciation on qualifying assets based on purchase amount, salvage value, estimated life and investment credits.

Features

- Maintain complete list of fixed assets
- Multiple depreciation methods available
- Monitor depreciation and review schedule
- Amortization schedule for tax or loan purposes
- Integrates with General Ledger

Rental Inventory

The Rental Inventory module gives you the solution you need to manage all of your rentals. Purchase our data collection device to make conducting your rental physical inventory even easier!

Features

- Short-term and long-term rental contracts
- Setup reoccurring billing for memorized long-term contracts
- Individual and global invoicing for contracts
- Automatic contract billing
- Place items on reserve
- Set up your delivery dates
- Customize rental rates and usage codes
- Store last major and minor service repair dates/usage
- Associate rental fees with any item
- Reservations
- Rerents
- Quotes
- Utilization Report
- Review overdue contracts
- Report items to be delivered
- Report items expected back
- Report items on reserve
- Report open contracts to review their status
- Quickly search and sort inventory look-ups
- Internal Control so asset values are always accurate
- Bar code your equipment with outdoor labels
- Unlimited contract history
- Unlimited detail transaction history
- Multiple memos for any rental item
- Service history report
- Exchange rented items during the contract as needed
- Each transaction which affects either the inventory value or floor plan amount is maintained in detail for as long as desired

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Auction

The Basic Software Systems Auction module is the perfect solution that allows dealers to setup their own in-house auctions. Use this module with our Equipment Inventory module and have the ability to automatically copy your used in-house inventory at the beginning of an auction to the Auction master files and manage your consignments.

Features

- Easy access to data fields with pop-up information windows throughout
- Transfer used equipment from equipment inventory for your auction
- Prints two party checks for consignee and lien holder
- Calculates consignment fees automatically
- Posts consignment fees automatically
- Allows miscellaneous charges for consigned equipment for repairs, storage, etc.
- Creates a report of all equipment items that are remaining after auction
- Lists customer, lien holder, buyer names and addresses alphabetically
- Can acquire a number of consignees in master file at any time
- Ability to preview all reports before printing

Advanced Reporting & Data Mining

This tool provides numerous advantages including a "dashboard," real-time graphical reporting of each department, real-time graphical or numeric financial data to allow the employees to more easily achieve sales and operational goals, and clean graphs/charts making it easy for all users to understand.

Features

- Standard and advanced search criteria
- Define columns you desire for your reports
- Add a calculated column
- Ascending / descending sort capabilities
- Add sums, averages, etc.
- Drag and drop technology
- Drilldown from a chart to see the details
- Export to Excel, PDF and other popular formats
- Create custom dashboards for live data reporting
- Reports can be printed including a chart
- Advanced Reporting includes:
    - Custom design
    - Across module design
    - Group Indexing for easy access on screen
    - Access to a library of pre-set query views created by the development team
    - Create your own library of queries for your customized lookups
    - Pivot grids - a multi-dimensional data aggregation and summarization tool
- Chart styles available for you to select including three dimensional and color options
- Charts can be used with pivot grids
- Defined grouping

⠿ INTERFACES

Basic Software Systems maintains effective relationships with world-wide Manufacturers to provide various interfaces between individual dealerships and their Manufacturers.
Call for full list.

Manufacturer Interfaces

Parts Ordering

• A & I®	• Kubota®
• AGCO®	• Kuhn®
• Bobcat®	• Mahindra®
• CNH®	• McCormick®
• Codis-Access®	• MTD®
• Grasshopper®	• Parts Unlimited®
• JCB®	• Sparex®
• John Deere®	• Tisco®
• Kawasaki®	• Vermeer®
• Kinze®	

Parts Catalog

• ARI PartSmart®	• Vermeer®
• AGCO®	• Woods®
• Bobcat®	
• CNH®	
• John Deere®	
• Kubota®	
• Mahindra®	
• Parts Manager Pro®	

Other Manufacturer Technology Options

• Parts Price Book
• Parts Locator
• Financial Data
• Credit Cards

Credit Cards

• AGCO Plus+
• CNH Productivity Plus
• John Deere Connect2
• Public Cards – MasterCard, Visa, Discover

Other Technology Partners

• Equipment Locator Service (ELS)®
• IRON Solutions®

DEVICES

We maintain effective relationships with world-wide Manufacturers to provide various interfaces between individual dealerships and their manufacturers.

Bar Code Scanners

Data Logic PBT9500 Cordless Scanner

- Cordless Bar Code Scanner gives you the freedom to move away from the point-of-sale counter to scan parts and equipment to an open ticket from the showroom floor, warehouse or outside sales lots. Scanner continues to scan and store data when you step outside of its range of 75ft so it can be downloaded to the open ticket when you step back in to range
- Bluetooth® wireless technology
- Equipped with the most advanced optics from Datalogic, including a 'liquid lens' which allows the imager to adapt the focus at different distances
- A new aiming system consists of a central cross and four dots in the corners
- Guarantees reliable and long term operations. Comes with Base for charging

Metro Logic MS9590 Voyager Corded Scanner

- Bar Code Scanner is a time saving device and excellent for use at point-of-sale counter to scan parts and equipment to open tickets. This Scanner can also be used for Time Clock and for Technicians in Service Area to keep accurate records of time spent on each service ticket/work order
- Ergonomic Design: 100 Scans Per Second: Improves scan aggressiveness
- Durable Construction: Reduces downtime and service costs
- Automatic In-Stand Detection: Allows seamless transition from hand-held to presentation mode scanning. Includes Stand

Mobile Computers / Data Collectors

Honeywell Dolphin CT50 Mobile Computer

- Hand Held Inventory Control Device
- Lightweight mobile computer that provides advance data collection and real time wireless communication, color touch screen and ensures 10 or more hours of continuous use (Works in Batch Mode also. Real time requires wireless network to be in place
- Used for price checks. It will scan bar code and pull up price and related information on parts such as bin location, qty on hand, description
- Used to scan items for physical inventory with option to change bin location, qty on hand, description in batch mode or real time with wireless network set up
- May be used for Equipment Inventory in batch mode or real time which does require wireless network to be in place
- Can be used for Inventory control for Multiple Companies by setting up Company 1 or Company 2 etc.
- Comes with base for charging and gun handle may be purchased for this unit
- Cuts physical inventory time for parts and equipment significantly

Bar Code Printer

Cognitive DLXi 2.4 Thermal Bar Code Printer

- Print your bar code labels from within Basic Software Systems quickly and easily
- Print one or thousands of bar codes using these rugged printers

Receipt Printer

SNBC BTP-880NP Receipt Printer with Auto Cutter

- Receipt Printer is a low cost thermal printer ideal for general POS, credit card and hospitality applications
- It offers drop in and print paper loading and tear bar or automatic cutter options
- It will interface with our MS EP-127NK-B Cash Drawer for auto pop open option at method of payment screen

Cash Drawers

MS EP-127NK-B Cash Drawer

- Five slot, steel construction and deep drawers
- Key lock or pop open button
- Bottom Tray with Check and receipt slots
- Dimensions 18.8" W x 18.2" L x 5.0" H
- Interfaces with our SNBC BPT-880NP Receipt Printer for auto pop open option at method of payment screen

Credit Card Payment Terminal

iSC250 Ingenico Credit Card Payment Terminal

- Meets the industries' highest and latest hardware and software security requirements and is PCI PTS 4.x certified
- Equipped to handle all forms of payment including EMV Chip & Pin, Chip & Sign, MagStripe, Signature Capture and Contactless
- iSC Touch 250 id designed for use in some of the harshest multilane environments
- Glass Display is highly resistant to impacts and scratching with a lifespan of 1Million signatures
- Signature Capture feature can be used with any method of payment option and is saved electronically

Credit Card Readers

iPP350 Pin Pad Credit Card Reader

- Meets the latest hardware and software security requirements
- PCI-PTS 2.x and 3.x certified
- iPP350 ensures secure data and application management along with highly secured transactions for the retailer
- Equipped to handle all forms of payment including EMV Chip & Pin, Chip & Sign, MagStripe and contactless

Signature Capture

Topaz SigLite 4.3 Signature Capture Pad

- SigLite Color 4.3 is an advance biometric electronic signature pad with full color
- 480.272 widescreen backlit TFT display
- LCD touch pad that shows signature on pad as well as computer screen
- Can be used for any method of payment option and saved electronically

ABOUT US

THE HISTORY BEHIND OUR COMPANY.

- Originated in 1979 in a local Ford dealership in NE Texas

- Servicing USA, Canada and Puerto Rico

- Industry leader, industry focused and dealer driven

- Reliable customer service with accounting expertise

- We listen and work for the success of our customers

- Always evolving, always improving and growing further

Basic Software Systems had a vision to enhance the technology available for dealers across the country and to provide an integrated solution for them.

The outdoor power, agriculture and construction industries have expanded its growth over the past several decades. The resources that we have available has allowed our customers to grow their stores, increase their productivity, and add efficiency within their business, as they rely on their Business Management System to manage their dealerships with a hands-on perspective.

The tools we provide to our customers are equally supported by our devoted teams within our company. With over 37 years of dealership experience, our company understands your industry, your business and the challenges you face everyday.

CONTACT INFORMATION

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