



**Your Path to
Continued
Financial Success**



Polaris Information Systems
1 Centerview Drive Ste 313 Greensboro, NC 27407
800-299-5152 336-855-5056
www.polarissystems.com



Polaris St ...The Right Tool For the Job

Designed specifically for your industry, by people in your industry, Polaris ST gives you the power and performance of modular hardware and the unmatched flexibility of the Windows operating system. Recognized in the industry as the Best Value, Polaris ST is perhaps the most flexible and powerful computer system available.

- Your system may be used simultaneously by as many people as needed—even up to hundreds of terminals if that is what you need.
- World-wide field service around the clock.
- Totally menu driven for ease of use.
- Instant help available on terminal from menus and screens.
- Single source solution for any questions or difficulties.
- VPN included for fast assistance from our staff.
- System automatically performs daily backup.
- Software updates may be received over phone lines.
- Software updates may be received over the internet.
- Daily, weekly and monthly procedures and reports may be run automatically after hours assuring you of proper system management.
- Uninterruptible power supply keeps your system running even when power has been lost.
- User conference and training sessions are conducted routinely.
- The entire system installation is managed by professionals with years of experience in your industry.
- We can provide conversion from many other computer systems.
- Your existing PC's may be used in conjunction with the system.

Special Industry Features Supported by Polaris Information Systems

AERA & PERA

- Casting numbers recorded
- Production scheduling
- Machine operation costing
- Open item core accounting
- Actual cost of remanufactured items
- Shop productivity analysis
- Find any job in shop in seconds
- Department reports
- Print job tags by department
- Machine operators quickly log job times with bar code readers

ADS

- Turbo Bill of Materials
- Nozzle cross referencing
- Flat rate analysis
- Injection pump components
- Cross-reference OEM parts
- “SD” features
- “CD” features

CFS

- Multi-level pricing features
- Fleet pricing
- Show substitute parts availability

SAA & TARA

- Spring Kits
- Look-up of spring by application
- Substitute spring feature with technical comments
- Fast automatic estimating for insurance claims. Especially helpful on large jobs
- Cross-reference OEM number to your part number
- Uniform labor rate
- Track jobs by vehicle ID or engine type

Order Processing

- Point-of-sale invoicing
- Unlimited per order
- Unlimited per invoice
- Walk-in customer may be automatically added to mailing list
- On-line order status tracking
- Inventory availability check
- Hold order for pick up
- Special order processing
- Drop ship capability
- User-defined payment terms
- Salesman commission tracking by product line or labor charge.
- Instant total day's sales
- Gross Margin analysis
- Add or change items on orders
- View entire order or any section
- Duplicate entry warning
- Override shipping address
- All voided orders require reason
- Maintains customer orders for extended periods
- Locate previously shipped orders by customer or purchase order
- Customer search by name or city
- Incomplete orders stored for recall
- Add special charges to any order
- Override terms on invoice
- Total amount of invoice
- Total cost of order
- Customer history inquiry
- Fast entry of frequently used parts
- Process backorders automatically
- Customer bank cards automatically blocked
- UPS multiple COD tag printing
- Daily promotional specials are displayed during order entry
- Special order items for customers may be easily located.
- Automatic backorder to purchase order
- Automatic special order to

- purchase order
- Merge customer backorder
- View customer backorders
- Display margin or order
- Display customer sales history by product line or part number
- Electronic telephone messages
- Send messages to other users
- Send messages to remote locations
- View purchase order information
- Extended terms (30-60-90)
- Authorize credit override from remote terminal
- Electronic parts catalog created from your information
- Add labor charges to any order
- Apply additional discount to order
- Add special charges to any line
- Add message referencing any line
- View price and cost extensions
- Reprint invoice regardless of age
- Walk-in customer purchasing history
- Prior bad check warning
- Override salesman when required
- Maintains mailing lists
- Print invoices or pick tickets on any printer on system
- Suppress the printing of specified items on any customer invoice
- Total the shipping weight of order
- Print additional shipping labels
- Display labor charges with detail
- Print estimates for customers
- Automatically convert estimates to orders or work orders
- Display detail of any job in shop
- Enter and recall internal notes on any order or work order
- Look up labor rates on terminal
- Find component within assembly
- List substitutes for parts
- Build finished goods
- Advise customer when job will be ready for pickup
- Inquire on customer cores
- Automatic core return
- Automatically calculate discount
- Display customer prepaid amount
- Display customer information
- Sales prospecting from terminal with automatic call back

- View non-table lines
- All taxes for US and Canada

Cross-Referencing

- Up to 20 OEM numbers allowed for each part number
- Multiple cross-reference numbers for all parts
- Automatic multiple substitute parts
- Listing of all possible substitute parts
- Ghost substitutes cross-referenced
- **Option to print OEM** or dealer part numbers on customer invoice
- **Print OEM part number labels for parts being shipped**
- Cross reference created when part number superseded
- Old part number crosses automatically to new part number

Pricing Control

- Unlimited base prices
- Pricing by product group
- Pricing by sub-class by product
- Pricing for specific customer by individual part number
- Pricing by special order
- Pricing for repair shop customers
- Quotation and bid pricing
- Pricing for fleets
- Pricing by quantity discounts
- *Next Item* promotes fast sequential price change data entry
- Pricing may be selectively or globally increased by percentage
- Prices may be overridden at point-of-sale and recorded
- Prices with low margins flagged
- Future price changes automatically load on specific date
- Pricing by contract
- Multi-level pricing escalators
- Core selling price and core cost
- Promotional tracking
- Case break pricing
- Bulk to item pricing
- Core Discount Tables
- Customer Discount Tables
- Part Discount Tables
- Labor Discount Tables
- Automatic Pricing Updates

Price List Pricing

- Print price list using your numbers
- Print pricelist using OEM numbers
Print price list with cross-reference from OEM to your numbers
- Print price list for specific dealers
- Individually customized price lists
- Print price list with future prices
- Customer price book in MS Word

Inventory Management

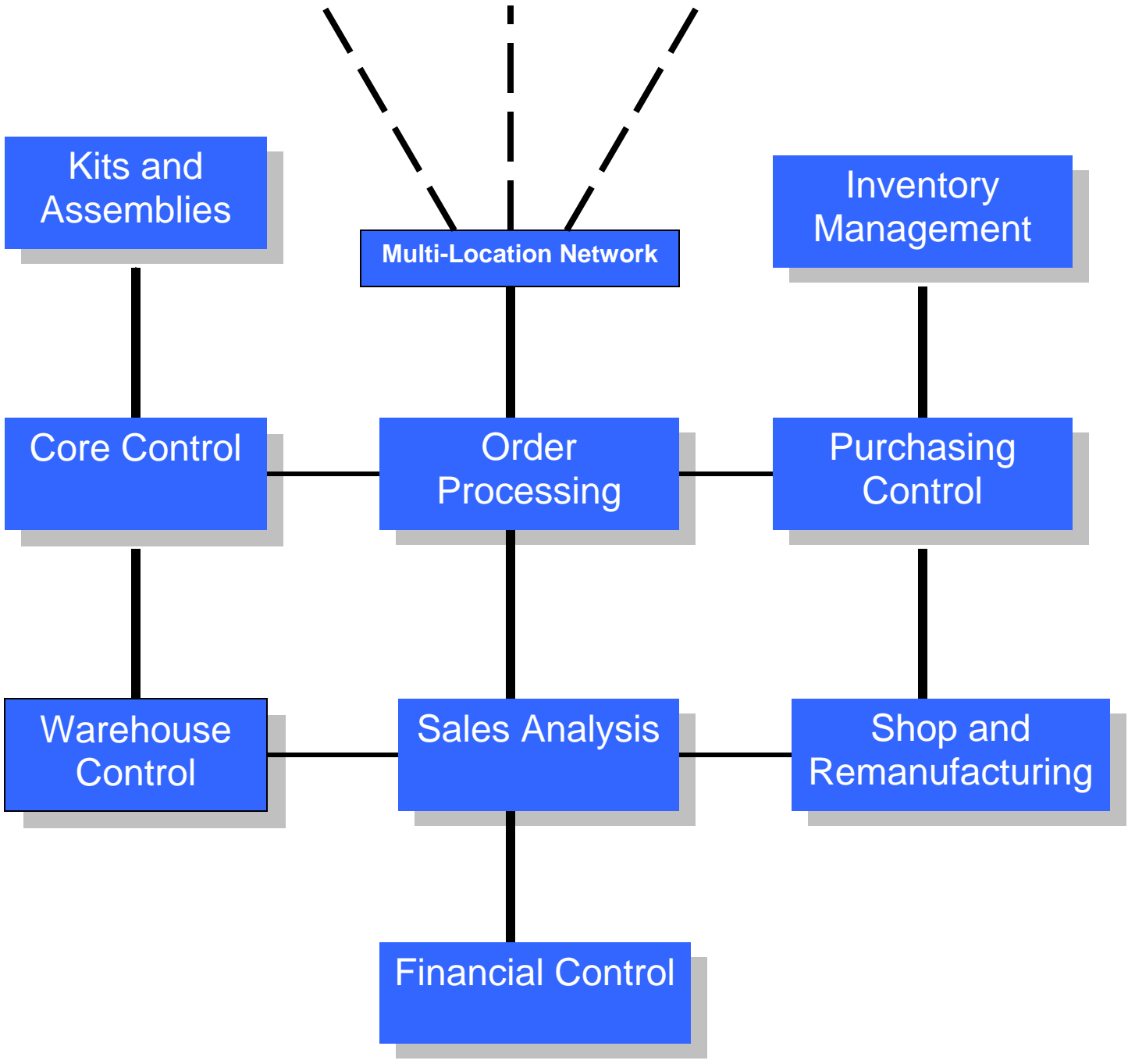
- 60 character description field
18 character alpha-numeric part number field
- Three character vendor code filed
- Additional descriptive field
- Pricing may differ at each location
- Multiple alternate vendors
- Product classifications for each item
- Bin location for each part number
- Overstock bin may be indicated
Inventory totals may be reported in virtually any format
- Average cost maintained
- Replacement cost maintained
- LIFO cost maintained
- FIFO cost maintained
- Customized inventory reporting
Same part number may exist with multiple vendor codes
- Vendor code automatically located
Quantity sold and quantity lost maintained for every month
System advises if item selling price is too high for your market
- Sequence numbers not required
- Seasonal trends monitored
Frequency analysis helps present costly overstocking
- Unit weight kept for each item
Part checked for open orders, backorders and quantity before deletion
- All inventory transactions logged with time, date and source
- Core charges may be added to parts

- Multiple special charges may be added to parts
Core inventory may be moved from rebuild to salvage
- Multiple technical comments may be attached to part numbers
- Sales information notes may be attached to part numbers
- Serial number management

Financial Management

General Ledger

- You may define the fiscal year beginning in any month
- You may have more than 12 periods within any fiscal year
- Automatic balancing posts and updates all transactions to ledger
- Account numbers are not limited to predetermined format so you may use your numbers
- Multiple formats for balance sheet
"What If" ledger formats may be created for projections
Income statement may be printed any time during the month
- Balance sheet may be printed in CPA format
- Budgeted statement of income may be produced at any time
Variable budget statement of income may be produced
- Comparative statement of income may be produced
Accounts grouped by departments, locations, or profit centers
Trace any account balance back to individual transactions
Custom reporting is fast with **INFO-ACCESS** reporter



Your Path to Continued Financial Success

Financial Management

General Ledger continued..

Recurring journal entries posted automatically

- Automatic check reconciliation's Not limited to only two months being open at the same time
Zero balancing prevents out-of-balance transactions from entry
- Automatic double posting assures in-balance condition of ledger
- Complete detailed audit trail
- Ledger supports multiple profit centers, companies, corporations
- Annual budgets may be applied to appropriate month
- Budget reporting reduces unauthorized purchases
- Updating and closing the accounting period is performed quickly with one easy to understand command
- Journal entries may be posted or printed any time during the month
- Recurring journal entries may be printed prior to posting
- Registers may be printed prior to posting
- Full 12 month analysis of all GL accounts upon demand
- GL accounts may be displayed in detail or summary at any time

Accounts Payable

- Cash requirements reporting
Trial balance printed upon demand
Payable account distribution report
- Cash disbursements report
- Disbursement account analysis
Print or display supplier lists in multiple formats
- You may have as many payable codes as necessary
- Discounts may be used on "Days Since Invoice" or "EOM"
- Payables may be entered with optional
- Supplier mailing labels
- Recurring payables may be automatic

- Enter & update cash disbursements
- Cash disbursements may be deleted if posted incorrectly
- Terms and discounts may be modified after payable entered
- Complete suppliers information may be displayed on terminal
- Payables may be quickly entered for "onetime" suppliers
- 1099 tracking saves you time at the end of the year

Accounts Receivable

- Fast cash receipts entry eliminates posting errors
- Counter men reminded of customers requiring purchase orders
- Multiple credit limits may be established by location
- Total credit limit may be established for all locations
- Pricing structure may not be altered without authorization
- You may have as many terms codes as necessary
- Any transaction may be adjusted
- Discounts may be based on "Days Since Invoice" or "EOM"
- Customers with more than one ship-to may have multiple salesman
- Salesman commission reporting by "gross" or "margin"
- Customers may be grouped by type
- Select either "open item" or "balance forward" or "both"
- Customer tax number recorded
- Statements may be printed any time
- Statements not required for COD customers
- Late charges may be automatically added on past due transactions
- Customers may have up to 999 ship-to locations
- Internal customers may be used to prevent frequent adjustments

- If you sell to competitors, they may be excluded from mailings
- Special tax rates may be entered for specific customers
- Out of country customers may have "country" in address
- More than one dealer type may be stored in customer record
- Grace period option reduces frequent adjustments
- Date customer added is recorded
- Date of last terms change is recorded
- Current and previous terms recorded
- Integrated word processor quickly notates phone calls
- Quick codes for popular messages
- Display current aging on terminal
- Display last statement aging
- Credit memos may be "aged" or maintained in current column
- Split payment invoices are flagged to prevent cash posting errors
- Unapplied cash report generated before month end
- Individual statement for specific customers may be generated
- Future aging improves cash flow with extended terms customers
- Customer payment performance for full year available upon demand
- Credit reference display
- Receivable month end close runs automatically without shutting down the system

**Integrated
e-commerce**
(additional cost)

- Shopping cart environment

- Updates new inventory items automatically
- Catalog descriptions with pictures
- Integrated bank card authorization
- Orders are automatically printed as a pick ticket or work order
- Free front web page included with links to your on-line store.
- Complete categorization of all product lines
- Special passwords given for those accounts on terms
- Initial "walk up" client registration with e-mail notification
- Able to show current status of any job in the shop
- Complete administration and security

Purchasing Control

- PO's automatically calculated
- PO's may be reviewed and adjusted
- PO's may be sent via TRANSNET for **faster** processing
- Minimum order requirements for each vendor are maintained
- Alternate supplier list maintained
- *Best Price* supplier indicated
- Unique Hits and Misses
- Automatic stocking and replenishment by vendor
- Automatic stocking and replenishment by sub-class
- Per job stocking for stock parts
- Shop minimum stock levels
- Frequency analysis
- Trend monitoring
- Seasonal ordering control
- True lost sales monitoring
- Master pack quantity maintained
- Purchasing unit may be different than selling unit
- You may set the ordering rules to your specifications
- Lead time automatically calculated
- Supplier reliability automatically

- maintained for each part number
- You may consolidate branch PO's for improved pricing
- Automatically creates purchase transfers to branches
- Check in sheet shows supplier number, your part number and bin, special orders, and "put away instructions"
- Part number labels may be printed for purchase orders
- Bar code labels may be printed for purchase orders
- Special orders processed fast
- Blanket purchase orders may be automatically created

Sales Analysis

- Sales analysis by product, by customer, by month
- Customer sales by vendor reporting
- Customers with decreasing sales volume reported automatically
- Margins maintained for customers
- Sales promotion profit report
- Multiple commission rates
- Monthly and yearly sales by salesman report
- Daily/weekly/monthly commission report based on dollars sold
- Daily/weekly/monthly commission report based on margin
- List of customers for any salesman
- Customized sales reporting using INFO-ACCESS reporter
- Sales frequency report by salesman
- On line sales prospecting
- On line telemarketing with automatic call-back feature
- Sales analysis by geographic area
- Report of sales for each state
- Special *Who Buys What* report
- Sales tracking by inside salesman
- Year-to-date profit by item
- Month-to-date profit by item
- Year-to-date profit by customer

- Month-to-date profit by customer
- *Hits and Miss* Report by part number

Warehouse Control

- Pick tickets may be sorted by location for faster picking
- Pick tickets may be consolidated by zones for large applications
- Shipping labels are included on pick ticket form
- UPS manifest
- Bar coded inventory labels
- On-line order status inquiry
- Additional items may be added to orders already in warehouse
- Report of daily shipping items
- Report of items shipped from each warehouse daily, weekly & monthly
- Automatic UPS and COD tags
- COD amounts may be box split
- Multiple freight carriers
- Weight of shipments calculated
- Reserved inventory system assures correct order filling
- Messages to customers may be printed on pick tickets or invoices
- Backorders processed quickly
- Backorder report by customer
- Customer backorders may be merged to reduce handling
- Bank card printing integrated with warehouse order processing
- Sell parts from other stores on same order
- Open regular orders listing
- Open special orders listing
- Report of orders entered within **24 hours, but not yet**

shipped

- Order status report
- Order fill percentage report
- Outstanding prepaid orders report
- Daily/weekly/monthly sales summary reports
- UPS zone chart may be updated using terminal
- UPS zone chart may be printed
- Daily totals reports
- Analysis of orders shipped today
- Instant daily totals displays dollars **by location.**

Core Control

- Core tracking by customer
- Core tracking by part number
- Core tracking by product line
- Transactions recorded for cores
- Core bank maintained in dollars
- Core bank maintained in units
- Cores may be deposited to bank
- Automatic core lookup at point-of-sale
- Core acquisition price maintained
- Vendor core return inventory
- Separate salvage core inventory
- Core credit applied to backorders
- **Over-returns blocked** unless authorized with codes
- Substitute cores allowed
- **Core value reporting**
- Multiple core inventories
- Deferred core billing

Shop and Remanufacturing

- Fast repair order entry
- Time and materials repairs
- Flat rate for any operation
- Multiple mechanics may log time on any job simultaneously
- Labor operations may be stored and recalled
- Compare flat rates to actual cost
- Each mechanic may have hourly rate and hourly cost
- Labor operations may be expanded into multiple steps
- A job step may have a standard time and a standard cost
- Detailed description of labor may be optionally printed on invoice
- Profit by mechanic recorded
- Profit centers by department
- Best time vs best cost analysis
- Time card entry from terminal
- Bar coded work order tags
- Bar coded mechanic time keeping
- Labor sales report
- Mechanic labor report]Job cost summary
- Flat rate analysis
- Report of unconverted estimates
- Mechanic specialty report
- Shop productivity report
- Time card report Estimate vs billing analysis
- Outstanding core report
- Time analysis report
- Stock work report
- Open job report
- Jobs due report
- Department schedule report

Kits and Assemblies

- **Labor may also be included**
- **Sales history maintained for both** individual components and kits
- Standard pricing calculated
- Multiple pricing structures
- Locate a component in a kit
- Find closest match to desired part

- Automatic costing
- Picking lists for kits
- **Kits may be built at point-of-sale**
- May list multiple sub-assemblies
- Substitute part numbers for kits

Multi-Location Network

- **Inventory detail by location**
- Locate inventory at other **warehouses**
- Duplicate inventory from one location to another
- Maintain receivable for each branch or combined for central control
- **Reports printed for one location** or *all* locations combined
- Financials printed for one location or all locations combined
- Combine locations into groups for receivables reporting and billing
- Place orders at any remote location
- **Ordering rules set by locations**
- Automatic splitting of purchase order to remote locations
- Automatic transfer documents from location to location
- Single, economical phone line **supports multiple locations**
- Point-to-point or multi-drop communications
- **Cores tracked by location** or central core bank
- Print remote pick tickets
- Drop ship from multiple locations
- **Salesman may be assigned by** location or for all locations
- **Credit limit set by location** or for **all locations combined**
- Sales analysis by location or totals