TRI·Tech
tri-technical systems

Tri-Tech has been an industry leader providing business solutions to Retailers since 1984.

AIMsi>>
Retail Software Solution

Active-e
Integration Services

INNOVATION + INTEGRATION
Free Online Demo
www.Technology4Retailers.com

Tri-Technical Systems offers a wide range of software solutions for the retailer interested in growing their business more efficiently and profitably.

AIMsi

A complete point of sale (POS), inventory management, accounting, and business software solution for your store.

Much more than a typical "off-the-shelf" package, AIMsi provides you not only with a way to ***control inventory***, ***manage customers***, and ***track sales***, but also offers fully integrated custom add-on modules such as repair & service tracking, lesson/appointment scheduling, short-term rentals, rent and sales contracts, contact management, emailing capabilities, AP/GL, and purchase orders. You can build your own custom retail software solution by adding on what you need. AIMsi also offers two distinct POS screens: a customizable touchscreen with an array of button options and a traditional, or classic, screen that uses a keyboard and mouse.

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Active-e

An integration service that partners with AIMsi for an enhanced web presence.

Active-e provides the connection to push inventory from AIMsi to an Active-e enabled website and download customer orders from that website back to AIMsi. Active-e is a set of services that create connections between various third-party applications, such as shopping carts, vendor sites via Business to Business (B2B), and customer accounts via Consumer to Business (C2B) components. B2B provides a connection from AIMsi to participating vendors' host computers in order to verify in-stock merchandise and quantities, check pricing, download new product, and place orders. C2B enables your AIMsi customers to check purchase history, post payments, and initiate rental contracts from your website.

AIMsi, Active-e, and PC>Poll are the intellectual property of Tri-Technical Systems. All other product and company names may be trademarks or registered trademarks of their respective companies.

AIMsi>>
Accounting and Inventory Management systems integration

Gain better control with these features!

Included in the AIMsi Basic Package

- Complete POS activity for touchscreen and standard computers
- Inventory management - contains powerful features designed to help reduce inventory cost and increase your cash flow and inventory turns
- Barcode labeling
- Gift and loyalty card tracking
- Accounts receivable
- More than 200 preloaded reports and the ability to create customized reports
- Employee time clock and security
- Licensing for 1 location and 1 workstation
- 1 hour of customized personal training
- 45 days of free support - use this time to familiarize yourself with the software and customize it to fit your business (additional support, training and IT options are available)

Through the use of add-on modules, stores have the ability to track the entire life cycle of their products from ordering to sales and repairs, reordering, and even the complete accounting behind all these operations.

Available optional add-ons

- Email Capabilities: send your customers receipts, sales promotions, coupons, and more
- Contact Management: track your customer and prospect correspondence
- Accounts Payable and General Ledger (Quickbooks™ interface utility included): tracks standard payables as well as invoice dating and invoice term payments and provides the tools needed to create accurate financial statements
- Purchase Orders: enter stock orders and create, print, and receive purchase orders from vendors
- Lesson/Appointment Scheduling & Billing: schedule lessons, bill students, and pay instructors
- Repair & Service Tracking: track and maintain a record through every step of the repair or service
- Licensing for additional workstations and stores

AIMsi works on most Windows-based systems.

Tri-Tech can convert your existing data (such as customers, inventory, and rentals) to AIMsi for a nominal fee.

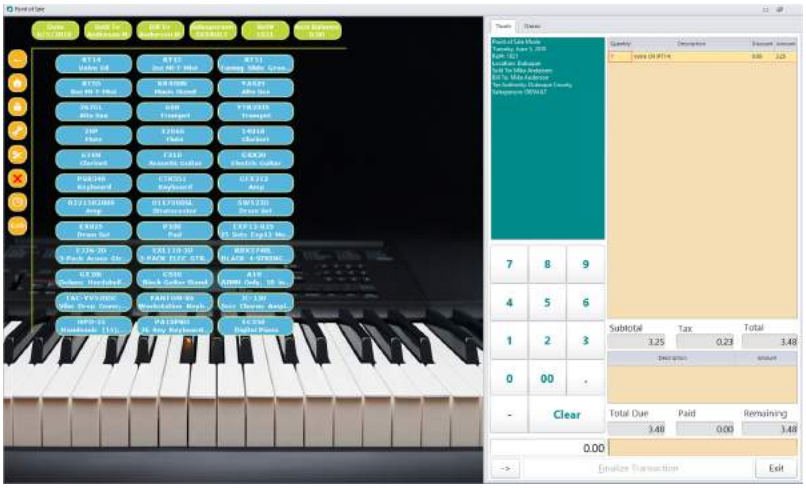
BASIC PACKAGE

POINT OF SALE

Simply posting daily sales helps provide most of the accounting needed in a typical retail store.

The complete history of every transaction is stored in AIMsi until you archive or delete it. The history includes: what you sold, who you sold it to, when it was sold, and for how much. This enables you to better analyze your sales, monitor the profitability of your inventory, and determine how well your sales staff is performing.

AIMsi stands apart from similar solutions by offering two distinct POS screen options: a fully customizable touchscreen POS system and a classic POS system that uses the keyboard and mouse.

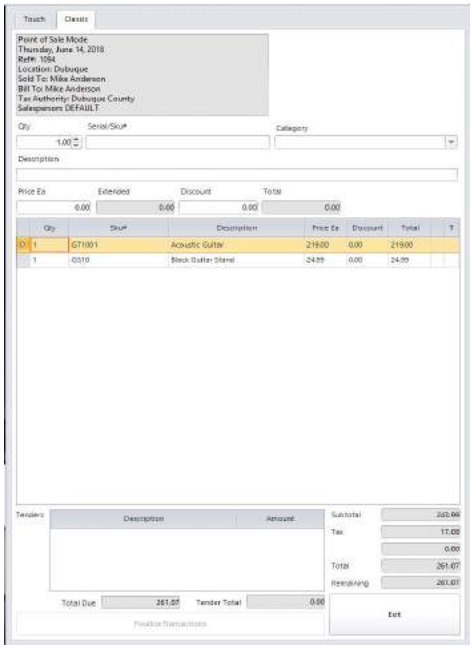


The touchscreen POS option is completely customizable. You decide the layout, appearance and function of the touchscreen buttons. You may create an unlimited number of menus and submenus that are represented by your custom buttons.

This AIMsi option was designed to be used with a touchscreen monitor, but also works with a traditional keyboard and mouse.

Within Point of Sale, you have the ability to bring special orders into a sale, turn proposals into sales, sell merchandise that was released on approval or demo, and more.

You also have the ability to accept payments, release inventory on approval or demo, create proposals, take in consignments or trade-ins, initiate or complete repair and service tickets, and collect payments ***all in one transaction***.

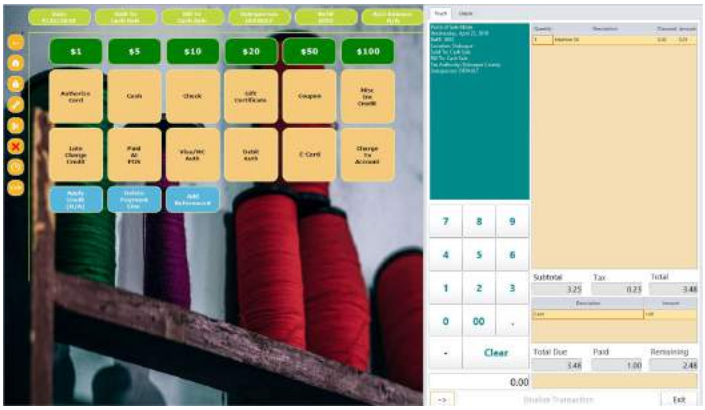


BASIC PACKAGE

POINT OF SALE

The POS screen options were designed to be flexible.

One checkout station might be strictly touchscreen, using the customizable POS screen option while another uses the classic POS screen. Also, the button menus are customizable by workstation and employee login, offering further flexibility and security.



Point of Sale Features

- Process small ticket sales in seconds using the Quick Sale feature.
- Take advantage of invoicing or house charge capabilities.
- Access inventory details easily for availability and pricing information while in POS.
- Include taxable and tax exempt line items on the same invoice.
- Run sales reports with a variety of selection options. Show gross margin percentages for commission purposes.
- Enter a proposal with the ability to turn the proposal into a sale at a later date.
- Establish package deals for special sales pricing and ease of processing.
- Monitor sales dollars against preset purchase orders and their limits.
- Create a table of standard messages to print on an invoice or add invoice messages on the fly.
- Print gift receipts.
- Suspend and recall sales.
- Use keyboard shortcuts to enter sales quickly.
- Run end-of-day reports to balance with your cash drawer.
- Search for customers in a number of ways, scan loyalty cards to pull up customer accounts, or create new customers on the fly.
- Complete multiple transactions at POS for one customer, collecting payment just once. Includes: sales, layaways, demos, special orders, payments, rental contracts, and repair tickets.
- Track split sales for commission purposes. Allows for different percentages to be applied to each sales person.
- Track trade-ins, consignments, and buy outright items.
- Track layaway sales.
- Track inventory sent out as a demo with an established return date. Turn the demo into a sale at a later date.
- Enter special order items at POS and track order progress. (Purchase Order module required.)
- Offer customers unlimited payment tenders per sales transaction with integrated credit/debit card processing. (Credit card processor required.)
- Apply discounts automatically by specifying sales per date range and inventory category.

BASIC PACKAGE

INVENTORY CONTROL

Have instant access to your available inventory.

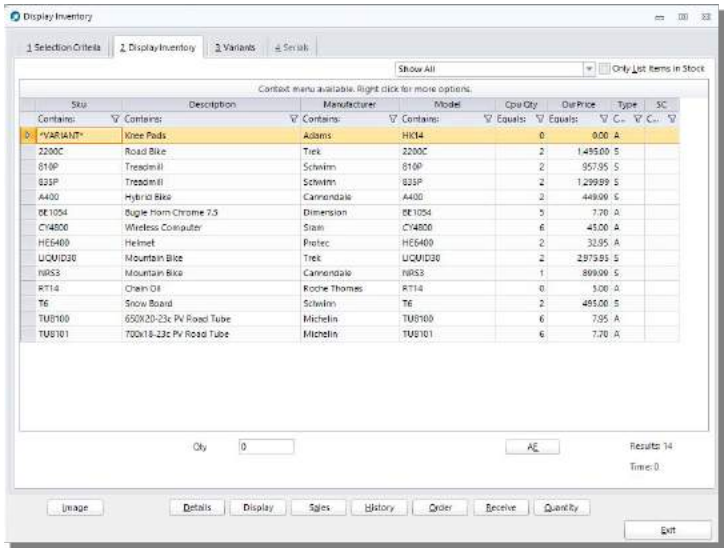
Sales staff can view inventory and determine what is available, the number of days the item has been in stock, maximum discounts, pricing levels, and other pertinent information that will facilitate the sale. Inventory searches can be performed using a number of key identifying fields.

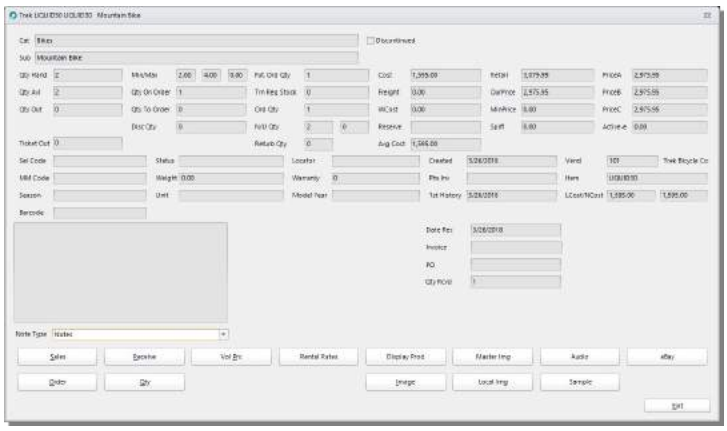
Inventory is completely interactive with all other areas of AIMsi and is as current as the latest transaction posted. Accounting audit trails are established to track consignments, trade-ins, and purchases from the customer, floored inventory, inventory sold on exception, and store-to-store transfers.

AIMsi has built-in inventory optimization procedures based on what you are selling. These automated procedures replace the pen, paper and calculator approach to determining what, how much, and when to order. They are designed to keep your store stocked with items that sell and to eliminate the influence of vendor sales-hype-driven ordering.

Inventory Features

- Track all inventory types: serialized, accessories, print inventory, parts and supplies, package deals, and kits.
- Display entire history of an inventory item in one program, including sales, rental (long and short-term), transfer, repair, and approval history.
- Track inventory returned to the vendor for repair or replacement.
- Track inventory that is on a floor plan. Reports show floored items in stock and sold.
- Set up unit of measure for purchasing and selling.
- Establish minimum selling prices by model or individual SKU number. Sales discounts are automatically taken at POS during specified dates and times.
- Establish up to six prices on inventory items. Specify by workstation or customer what pricing level to use at POS.
- Run reports by type of inventory: sales, cost of goods sold, gross profit ($ or %), average inventory, inventory turns, sales as % of total sales, inventory as % of total inventory, and gross margin return on inventory.
- Count physical inventory quickly and easily with hand-held store floor data collectors.
- Optimize your inventory using the color/size matrix.
- Establish min/max quantities for items using the automatic inventory optimization procedures.





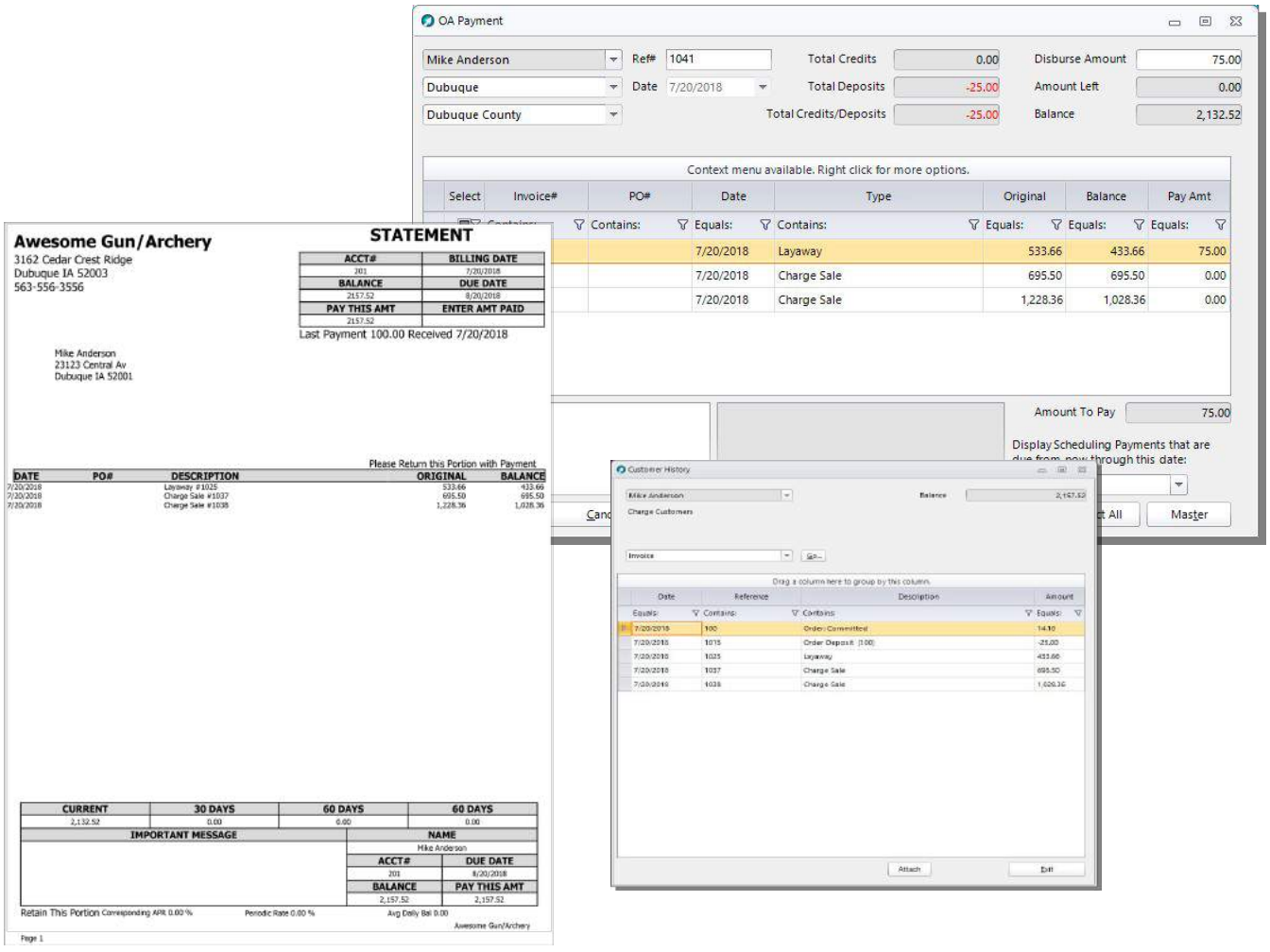
BASIC PACKAGE

ACCOUNTS RECEIVABLE

Track money owed to you. Knowing who owes money, how much is owed, and when it is due is key to determining expected cash flow. The accounts receivable features in AIMsi are designed to accurately manage this information and provide the necessary reports enabling you to get a snapshot of your receivables at any time.

Accounts Receivable Features

- Print statements with the option to show the entire balance due or a minimum payment due.
- Print accounts receivable aging reports.
- Print user-defined template-based letters to your customers, such as for layaways or delinquency notices. (Microsoft® Word® required.)
- Calculate interest on open accounts. You determine the number of days of "free" interest.
- View or print the complete history of any customer at any time.
- Run reports of "top" customers. Provide these customers with barcoded loyalty cards.
- Transfer an invoice or entire customer history from one account to another quickly and easily.



BASIC PACKAGE

ELECTRONIC GIFT AND LOYALTY CARDS

Tri-Tech can provide custom electronic gift cards with your logo and branding on the card.

Electronic gift cards and renewable money cards provide secured tracking of gift certificates and prepaid money cards.

Merchandise return credit and other store credits can be tracked on the cards.

Implement a customizable customer loyalty program based on dollars spent or points to redeem at POS. Send out promotional mailings and coupons based on your loyalty program.

PAYROLL AND EMPLOYEE TIME CLOCK

AIMsi is integrated with PenSoft® Payroll (purchased separately) which applies employee earnings and deductions, automatically calculates employee and employer payroll taxes, and prints checks and stubs complete with year-to-date earnings and tax information.

Employee Time Clock records the hours worked by your employees, vacation time, sick days, and personal leaves of absence. Notes may be added for a specific employee or for all employees to read when clocking in or out. Reports are available to list the hours worked during a specific time period.

Employee Messaging allows employees to view and reply to messages when they log in.

SECURITY

AIMsi provides the ability for you to set up various employee user groups and set security permissions accordingly. Every menu option, all reports, and numerous processes are security-enabled.

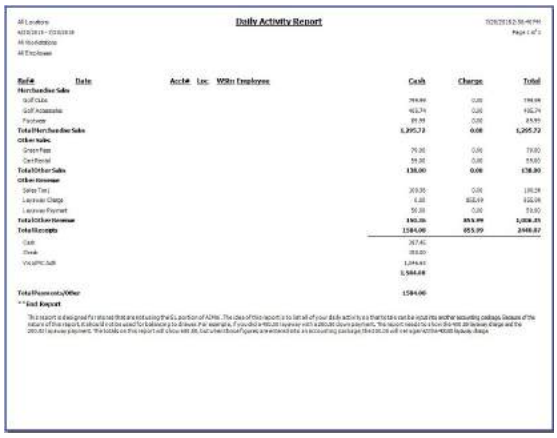
BASIC PACKAGE

REPORTING OPTIONS

Review staff performance, inventory control and more with just a few mouse clicks!

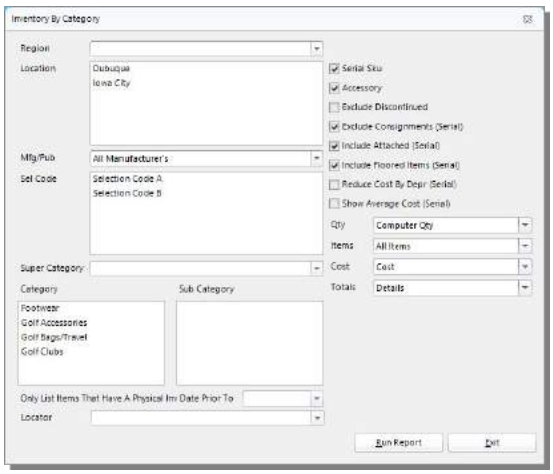
All point of sale systems collect data, but being able to access that data quickly and drill down to just the data set you want to see is the hallmark of an exceptional system.

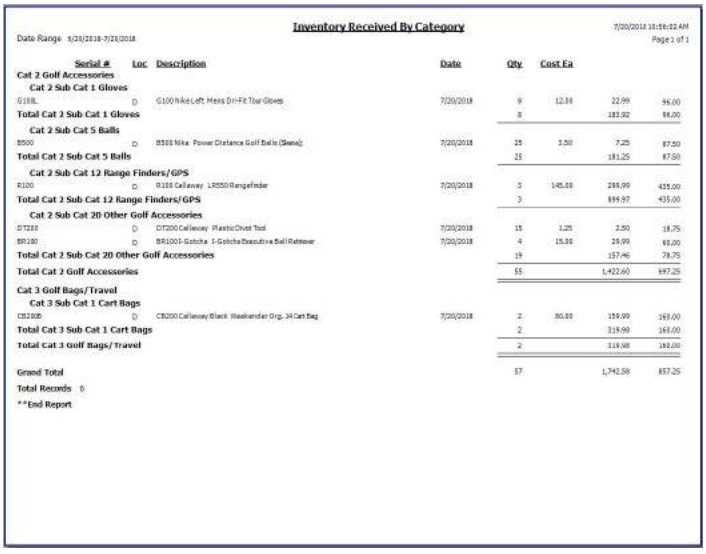
The Report Catalog offers a wealth of reports that can be generated quickly and easily. Simply select the desired report, select filter criteria, and then select a report destination. Within moments you can have full report data at your fingertips.


Daily Activity Report

Reporting Features

- Take advantage of the extensive library of AIMsi and Active-e reports.
- View, print, and export report output to a variety of format types.
- Create customer lists for targeted marketing.
- Filter on customer demographics such as customer type, ZIP Code ranges, and sales information for letters.




Inventory Received By Category

ADD-ONS

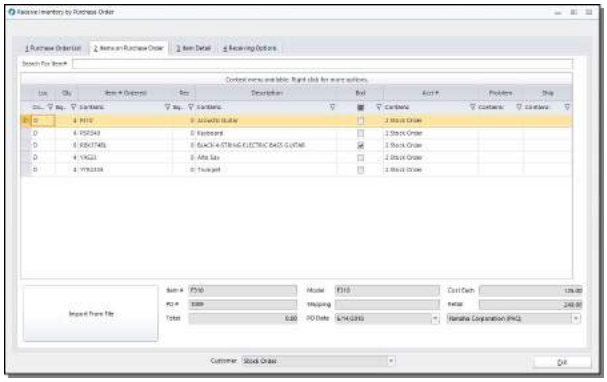
PURCHASE ORDERS

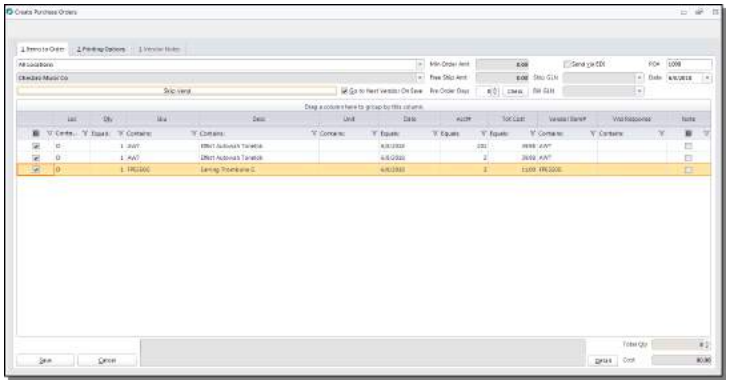
Track special orders for customers, enter stock orders, and create, print and receive purchase orders from vendors.

Purchase Orders is fully integrated with the Inventory Control, Accounts Receivable, Accounts Payable, and General Ledger modules. You may display the purchase order information when entering an Accounts Payable invoice to verify and change, if necessary, the cost of received items. Inventory and general ledger are updated as purchase orders are received.

Purchase Order Features

- Enter special orders for customers. Turn the special orders into sales when received.
- List special orders that have been received but not yet invoiced to the customer.
- Manage canceled special orders. If you have not received the special order items, choose to delete the order, transfer the items to an existing order, or transfer the items to a new order. If you have received the special order items, easily transfer them to your available stock.
- Track back orders and other exceptions easily. The purchase order may remain open, be canceled, or the items may be reordered on a new purchase order.
- Track "best price" for accessories that are provided by multiple vendors and change the vendor to order from when necessary.
- Print pick lists.
- Change cost, prices, and other information when receiving.
- Generate reports for order status, back orders, and suggested inventory to buy based on established reorder points. Outstanding orders will be taken into account.
- Print barcodes as inventory is received on a purchase order (requires a barcode printer).
- Change the shipping address on an order, for a customer, or for your stock, quickly and easily.
- View the monthly sales history of an item when ordering.
- Use EDI to electronically transfer information (purchase orders, invoices, product availability, etc.) between your store and other companies.





ADD-ONS

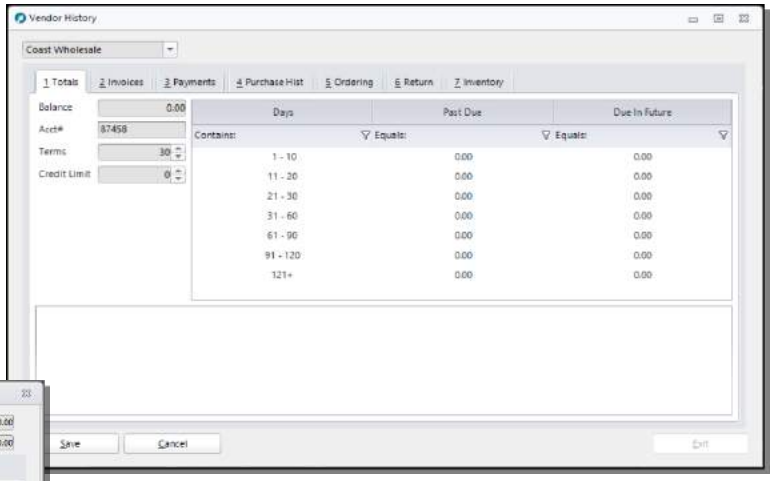
ACCOUNTS PAYABLE

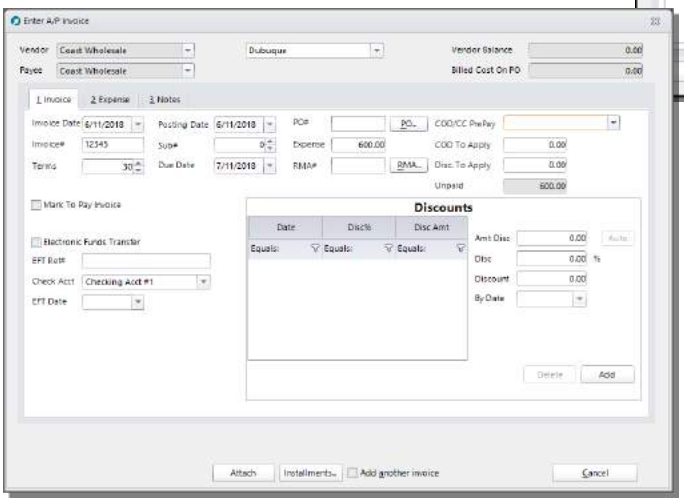
Manage your accounts payable by vendor or date and perform a vendor cost analysis anytime.

Accounts Payable tracks standard payables as well as invoice dating and invoice term payments. Liability for accounting is tracked by vendor, enabling you to automatically separate inventory purchases, bank notes, and other payables on the financial statement. A complete history of each vendor is maintained. You may view all purchases, invoices and payments by vendor at any time.

Accounts Payable Features

- Establish two levels of discounts on invoices. The best available discount is automatically used to pay invoices.
- Pay invoices individually, by vendor or by date.
- Track COD checks that were written to vendors.
- Enter credit memos. Display the inventory that was transferred back to the vendor and make cost adjustments.
- Display monthly vendor cost analysis for any 12-month period.
- Consolidate multiple invoices into one for term payments (dating).
- Print checks from AIMsi or post manually written checks.
- View purchase order information when entering an invoice, making cost adjustments to the received item.
- Void checks with ease.
- Set up numerous checking accounts.
- Generate invoice aging reports.





ADD-ONS

GENERAL LEDGER

A CPA-approved solution for all your accounting needs - whether you or an accounting firm prepares your financial statements.

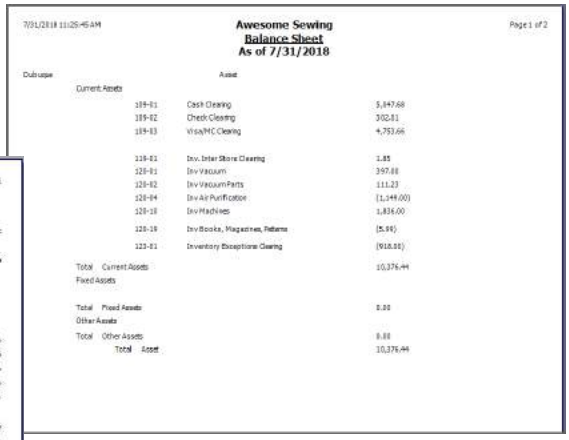
General Ledger is designed to provide the necessary tools for you or your accounting firm to prepare complete and accurate financial statements. General Ledger, and many of the reports available, were designed with CPAs who are experienced in the retail industry.

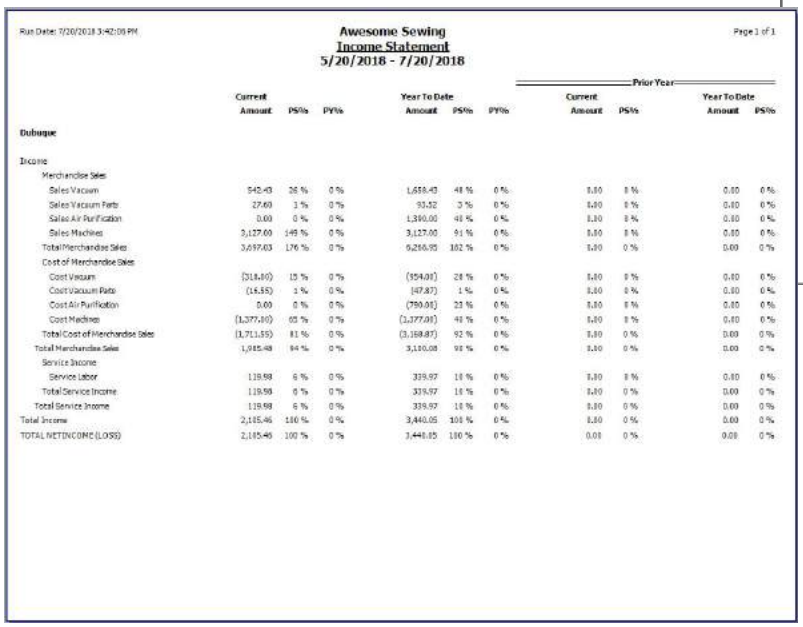
The accounting functions are interactive with all areas of AIMsi. Your accounting is immediately updated in General Ledger when a file is changed or updated through posting.

General Ledger comes with complete Chart of Accounts and Control Tables. These accounts and tables may be changed to accommodate the accounting procedures established by you and your accounting firm.

General Ledger Features

- Save ledger details when you close out the month and maintain them for a complete year.
- Print financial/budget statements by department and store location.
- Compare the current year to the prior year on the income statement.
- Analyze inventory turns and gross profit.
- Use AIMsi's standard month-end financial statements or create your own. For example, create a departmentalized income statement showing accounts for department managers.
- Generate a monthly tax report showing total taxable sales, tax exempt sales, and the sales tax payable for any period.
- Print check registers by checking account and cancel cleared checks on your statement in one easy step.
- Track ledger discrepancies with discrepancy reports.
- Take advantage of AIMsi's integration with Quickbooks.


Awesome Sewing
Balance Sheet
As of 7/31/2018


Awesome Sewing
Income Statement
5/20/2018 - 7/20/2018

ADD-ONS

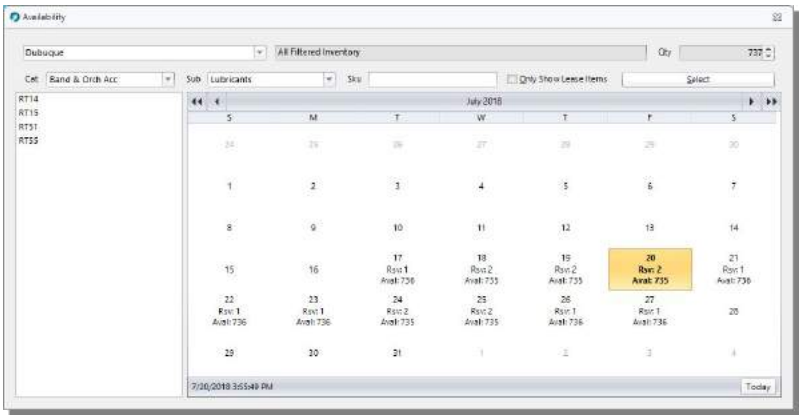
SHORT-TERM RENTALS

Keep accurate records of all your short-term rentals by customer or inventory item.

Retailers that rent inventory on a short-term (hourly, daily, weekend, or weekly) basis know that it is crucial to keep accurate records of the entire rental process: who needs what, when, and for how long. Short-Term Rentals automates this process, enabling you to quickly determine the inventory out on rent and when it is due back. Short-term rentals can be tracked through both the customer record and inventory record.

Short-Term Rentals Features

- Reserve inventory for a future short-term rental, specifying a pick-up date and time and a return date and time.
- Warn staff members if an item on reserve is about to be reserved for someone else on overlapping dates or times.
- Pull a reservation into a short-term rental when the inventory is picked up or delivered.
- View availability by category, subcategory, model, SKU, and more.
- Collect a deposit at the time of the reservation and refund or apply it when the inventory is picked up.
- Capture credit card information for security deposits.
- Run reports of all outstanding short-term rentals or just those that have not been returned by the specified return date.
- Extend the due date, collecting additional money if required.
- Add late charges when necessary.



Dubuque
6/20/2018 - 7/20/2018

Serial Contract Inventory Analysis

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Page 1 of 1

	Days Out	% Out	Income
Band - Clarinet			
1401B			
CL1002	1	3.23 %	90.00
Totals for: 1401B		**3.23 %**	**90.00**
Totals for: Band - Clarinet		**3.23 %**	**90.00**
Band - Alto sax			
767GL			
AS1004	1	3.23 %	75.00
Totals for: 767GL		**3.23 %**	**75.00**
Totals for: Band - Alto sax		**3.23 %**	**75.00**
Sound Reinforcement - Powered Mixer			
SOU 688			
ISI1005	1	3.23 %	150.00
ISI1007	1	3.23 %	25.00
Totals for: SOU 688		**3.23 %**	**175.00**
Totals for: Sound Reinforcement - Powered Mixer		**3.23 %**	**175.00**

*This report does not include sales contracts

ADD-ONS

LONG-TERM RENT & SALES CONTRACTS

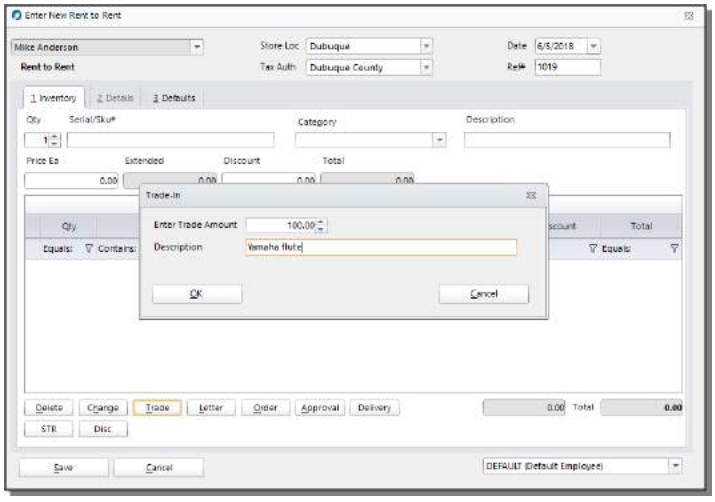
Flexible control of all your long-term rental, service and installment contracts.

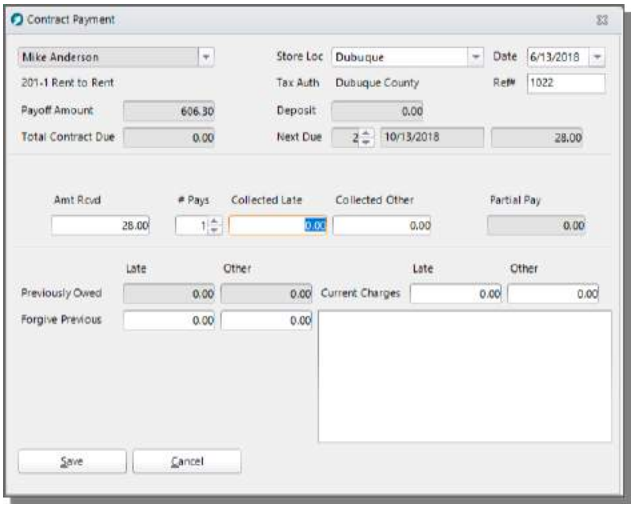
Long-Term Rent & Sales Contracts is designed to give flexibility to each store for the control of rental, service, and installment contracts. The various types of rentals that may be tracked are: Rent Month-to-Month, Rent-to-Own, Sales Contracts, Lease Purchases, and Extended Warranty or Service Contracts.

The complete history of each contract is maintained, even after the contract is paid off or returned. Sales staff can easily look up a contract and view the complete breakdown of payments due, including payoff info. It's easier than pulling a ledger card!

Rent & Sales Contracts Features

- Use multiple formulas to calculate payment credit on month-to-month rentals, such as 100% the first 6 months and 80% thereafter.
- Track inventory that is coded as being out on rent and control how late charges should be assessed.
- Collect rental income and update the inventory record as payments are made.
- Print coupon books or rental contract statements (MICR coupon availability).
- Set up contracts for automatic monthly credit card (integrated credit card processing is required) or bank debit payments (Treasury Software is required). At the push of a button, AIMsi selects these contracts, charges the credit cards, and automatically posts the payments.
- Prepare delinquency notices on demand and dramatically improve your collections process. Find delinquent accounts and print applicable notices tracking whether the account should receive a first, second, third, or fourth notice.
- Mark a contract for collection and halt all activity on the contract or continue to add payments and late charges.
- Exchange inventory on rentals.
- Establish payoff discounts that are automatically calculated when viewing or posting a payoff.
- Print purchase option letters.
- Generate contract aging and receivables reports.





ADD-ONS

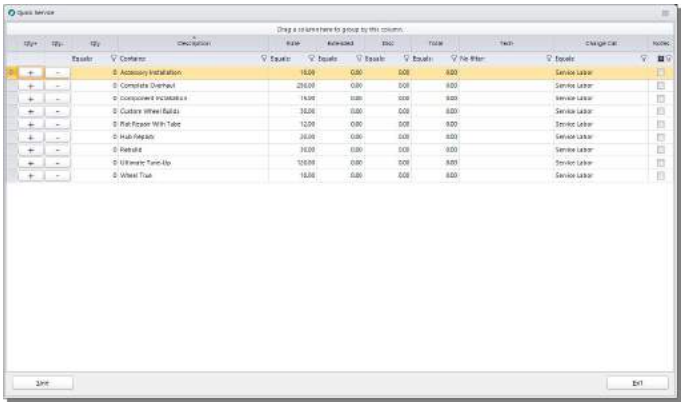
REPAIR & SERVICE

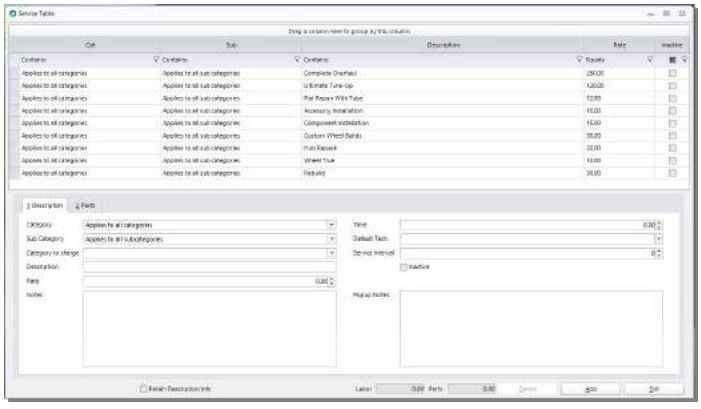
Manage repair and service tickets.

Repair & Service tracks repairs from the receipt of the item to billing the customer and returning the item. This includes estimates, loaners, warranties, and all stages of the repair and service process. A complete repair and service history is maintained for all items repaired, whether the item was purchased from you or not.

Repair & Service Features

- Prepare work tickets and generate estimates.
- Track inventory loaned to the customer while the item is being repaired.
- Add multiple repair tickets to the same customer account without leaving the repair ticket window each time a ticket is saved.
- Attach parts to repairs when setting up the common repairs table. This helps you track your repair parts and saves time when entering a repair ticket.
- View warranty information for items purchased or rented from your store.
- Assign a technician to the repair order.
- Change the shipping address to send the repaired item to when you enter or complete the repair.
- Set up a common repairs table by type of item to be repaired and select from the table when a repair ticket is entered.
- Establish the recommended next service date and letter to be sent to the customer at the time a repair ticket is entered or completed. The letter automatically prints at the next scheduled repair date.
- Assign multiple repair tickets for a customer to a single master ticket number. Access the information from all of the tickets in one location.
- Send text messages to your customers when their service is completed (B2B required).





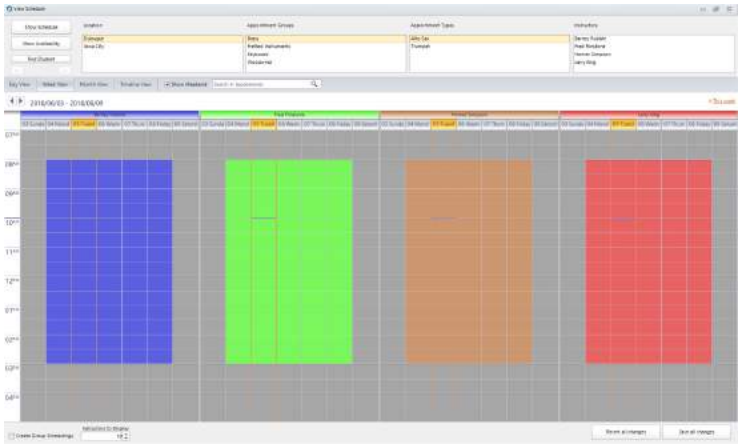
ADD-ONS

LESSON/APPOINTMENT SCHEDULING & BILLING

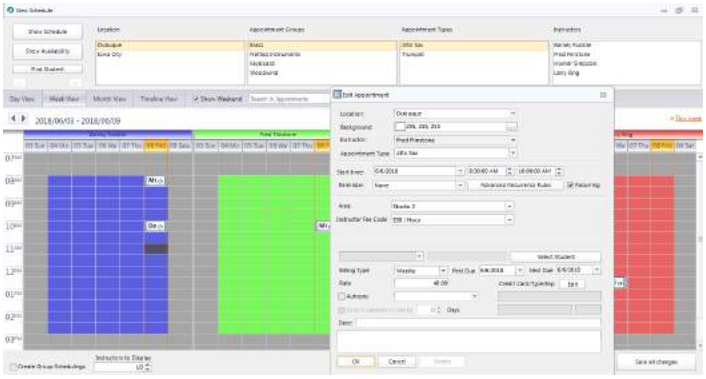
Manage your lessons in one place.

Lesson/Appointment Scheduling & Billing enables you to schedule lessons, bill students and pay instructors. It provides a current schedule for each instructor and studio space. You can quickly determine studio space and instructor availability for a specific day and time. Lesson/Appointment Scheduling & Billing is completely integrated with the Accounts Receivable and General Ledger modules.

Lesson/Appointment Scheduling & Billing Features



- Create flexible schedules. For example, a student may take multiple lessons in one week. Each at a different time, with a different instructor, and in a different area.
- Bill on a flexible schedule including: weekly, monthly, annually, or term.
- Specify whether to allow scheduling conflicts. If a conflict occurs when scheduling, quickly determine the student already scheduled at that time and if the conflict is of type 'area' or 'instructor'.
- Create group lessons and add students to the group. Later change students or cancel the group.
- View the lesson schedule for a specific date, instructor, or area.
- Assign start and end dates. The student is automatically removed from the schedule after the end date.



- Define a default time increment for the schedule, for example, 15, 30, or 60 minutes.
- Track attendance. Select excused or unexcused absence reasons from an absence table.
- Make temporary schedule changes such as make-up lessons.
- Invoice the students for lessons according to the student billing. Enter payments as they are received.
- Pay an instructor according to the amount or percentage of student payment that goes to the instructor.
- Print an attendance sheet for the instructor.
- Add notes to schedule records directly on the schedule or while in the student record.
- Generate a report showing total lesson income and amounts paid to the instructor.
- Offer customers an autopay option for lesson invoices.

AIMsi Basic Package

(1 location, 1 workstation)

This package includes:

- Complete POS activity (touchscreen & classic)
- Inventory management with barcode labeling
- Gift & loyalty card tracking
- Accounts receivable, daily reports, and time clock
- Licensing for 1 location and 1 user
- 45 days free support, 1 hour of personalized online training

Basic Package	Price
AIMsi	See Reseller for Pricing
Add-On Modules	
E-mail Capabilities	See Reseller for Pricing
Contact Management	See Reseller for Pricing
Short-Term Rentals	See Reseller for Pricing
Accounts Payable	See Reseller for Pricing
General Ledger	See Reseller for Pricing
Purchase Orders	See Reseller for Pricing
Lesson/Appointment Scheduling & Billing	See Reseller for Pricing
Repair & Service Tracking	See Reseller for Pricing
Active-e Integration (monthly charges apply)	FREE
Long-Term Rental and Sales Contracts	See Reseller for Pricing
Additional Workstation Licenses	See Reseller for Pricing
Additional Store Location Licenses	

Online help is included with the software; any or all sections may be printed.
AIMsi is compatible with most Windows-based PC systems.
Installation of SQL Server and .Net 4.7 are required for AIMsi v12.
A complete list of system requirements can be found on our website: https://www.technology4retailers.com/t-networkprep.aspx

ACTIVE-E INTEGRATION

SHOPPING CART

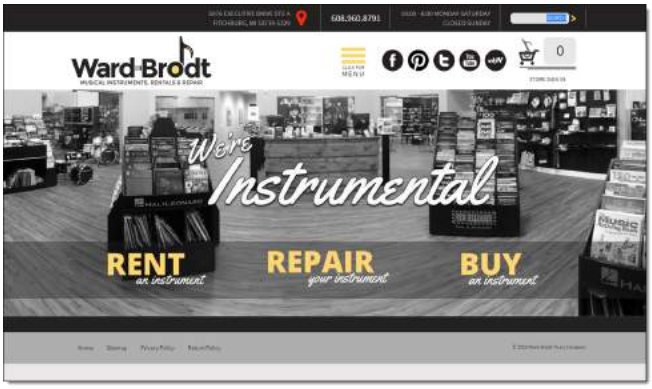
Inventory integration with AIMsi makes this an unbeatable e-commerce solution.

How does it work?

Select the items you want to add to your website using the AIMsi software and automatically push them to AIMsiStorefront. Optionally set a minimum order threshold and required purchases (if you purchase X you must purchase Y), select a customer-level pricing structure, and calculate shipping charges using major shipping methods. You can even take advantage of AIMsStorefront's sophisticated promotions engine, coupons, and gift cards.

Your website is designed to allow search engines, such as Google or Bing, to fully crawl and index every product in your store resulting in increased web traffic. Once customers are on your website, you can entice additional sales by showing related, upsell, and featured products and accessories. Orders in your online store are automatically pulled into AIMsi without tedious manual entry. You can manage your online store with an easy-to-use web-based interface.

Other benefits for your customers



- A secure shopping experience with real-time inventory updates.
- An advanced product search page; search by category, manufacturer, price range, and more.
- An efficient, modern checkout with built-in payment options including Amazon, PayPal, and Braintree.
- The option to review and rate your products.

Compliance and Certifications

Active-e supports TLS 1.2 and is PCI (PA-DSS) certified.

AIMsi is EMV-ready and does not store cardholder data. We have implemented advanced security measures to provide you and your customers with a certified, secure solution. If desired, AIMsi also supports MAP (minimum advertised price) compliance by hiding product prices until the product is added to the shopping cart.

ACTIVE-E INTEGRATION

B2B

Online ordering through a secure connection is easy and convenient with Active-e. You'll have a direct connection to participating vendors' host computers. This makes placing orders, checking available stock, checking prices, and locating new products a cinch.

Active-e is EDI-enabled; you can download SKU numbers, images, short and long product descriptions, and the MSRP. EDI means no more data entry when new models come out and no more missing those price changes. It is all automated with AIMsi and Active-e.

- Set up price relation percentages for each of your AIMsi prices: Cost, Retail, Our Price, Min Price, Price A, B, and C. Apply price rounding rules to round those prices to .05, .95, .99, and so on.
- View vendor images from AIMsi.
- Receive your A/P invoice electronically.
- Check supplier availability before you submit a PO and let your customer know when to expect their product as you enter their special order.
- Send electronic POs to your vendors and avoid mistakes from faxed POs being misread or incorrectly entered into vendors systems.
- Request advanced shipping notices (ASN) from a supplier once an order is shipped.
- Perform electronic consumer credit checks, with three levels of credit checking, using TransUnion, Equifax, or Experian.
- Use Reverse Phone Lookup to automatically populate customer name and address fields. (Additional fees apply.)
- Turn AIMsi into an automatic outbound call center for late payment reminders, special order notifications, repair and service notifications, and more with Phone Notify. (Additional fees apply.)

C2B

Your customers can interact with their AIMsi account activity from your website using a secure online connection.

Customer interaction includes:

- Review sales history
- Review special order status
- Make open account payments and rental payments
- Initiate rental reservations and contracts
- Request rental repairs
- Plus much more

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