



TRAVERSE ERP Microsoft Product

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Open Systems is a single source provider of powerful accounting and finance solutions for small and mid-market customers. Throughout its 25+ years, Open Systems has partnered with thousands of independent resellers, consultants and developers in order to deliver solutions to over 250,000 small, growing and mid-market software users. From core accounting and finance to manufacturing and eBusiness, Open Systems has products and services to meet your business needs. Regardless of your company size, industry sector or current market conditions, we can help you.

Small and Mid-size Businesses - Companies with smaller user groups need a solution that provides excellent performance and is easily customizable. TRAVERSE Business Edition meets this need with integrated accounting, distribution and reporting applications as well as a number of featured vertical applications.

Growing Mid-size Businesses - TRAVERSE Enterprise Edition and TRAVERSE eBusiness Solutions offer full-featured applications for accounting, distribution, manufacturing and eBusiness as well as a number of featured vertical applications. These solutions are an excellent choice for growing mid-size companies who need increased performance, system scalability, and true remote access to critical corporate data.

TRAVERSE Business Edition

Developed using 100% Microsoft technology, TRAVERSE features excellent performance and complete integration with Microsoft BackOffice products. Customization is easy and economical since Visual Basic for Applications source code is available for the entire suite of accounting modules. TRAVERSE Small Business Edition is designed for the entry-level market (1 to 3 users). TRAVERSE Business Edition is designed for companies that have up to 12 users. This version of TRAVERSE utilizes the SQL Server Desktop (or MSDE). It includes accounting and distribution applications as well as reporting capabilities.

TRVERSE Enterprise Edition

TRVERSE Enterprise Edition is a client/server solution developed with a SQL Server back end. It is designed for companies who need an unlimited amount of users. The SQL Server database can handle over 4000 concurrent users, generating up to 18 million database queries per day. It is an outstanding ERP software choice for growing mid-size companies using a Microsoft platform and includes accounting, distribution and advanced reporting applications as well as additional applications for vertical industries.

TRVERSE eBusiness Solutions Access your business information any time, anywhere with TRVERSE eBusiness Solutions. You can streamline key business processes with TRVERSE accounting applications, allowing you to maximize efficiency and making it easier for you to do business with your customers, vendors and partners. TRVERSE eBusiness applications require TRVERSE Accounting Software. Applications include:

eManager - required with all eBusiness applications, eManager handles the overall security and administrative services, which include menu access and new user setup for all eBusiness applications.

eSales Rep -your sales reps can access vital customer information, place orders, and do advanced inventory searches online from any location: home, office, hotel, customer site, etc.

eCustomer Inquiry - empowers your customers to look up their specific TRVERSE account information online.

eCustomer Order - cut costs and tighten your partnership with your customers. eCustomer Order gives them the ability to place orders online, do inventory searches, create a pending order, and view the status of open orders.

Customized eBusiness Solutions are also available, including **Business-to-Business (B2B)**, **Business-to-Consumer (B2C)**, and three **Customer Relationship Management (CRM)** applications:

TRVERSE Advanced System Management

- System Manager
- (BI) Business Intelligence
- (AIA) Advanced Information Analyst
- TRVERSE Digital Dashboard
- Info-Alert
- Advanced Financial Analyst

TRAVERSE accounting software is the business management backbone for many small, growing and mid-market companies. TRAVERSE offers advanced reporting capabilities, eBusiness solutions, specialized modules for manufacturing and distribution, and a number of featured vertical applications.

TRAVERSE provides these key advantages:

Value – The TRAVERSE application suite delivers a comprehensive set of solutions for your business needs with the best price-to-performance ratio in its market category.

Scalability – Open Systems can deliver a TRAVERSE solution to meet the needs of your growing company. This scalable solution can be implemented for one to hundreds of users.

Proven Microsoft Technology - TRAVERSE was designed 100% using proven Microsoft technology, including seamless integration with Microsoft Office and BackOffice products.

Internet Integration – TRAVERSE includes several eBusiness modules that allow you to easily integrate your back office operations with your online strategy.

Open Source Code – Open Systems provides source code for our applications at no additional cost. We do this to protect your investment, while also encouraging customization to support unique client needs and changing market conditions.

System Manager

Flexibility, customization, and a full complement of tools [Click to see Demo](#)

TRAVERSE gives you the tools you're already familiar with and provides a seamless interface to Microsoft products such as Word, Excel, and Mail as well as HTML language for the Internet. It was developed with Visual Basic™, SQL Server, and Microsoft Access - the most powerful databases available. Access has a simple design philosophy, so it is easy to use for everyone, regardless of the level of expertise. SQL Server integrates with the BackOffice family of products, including Exchange and Internet Information Server.

TRAVERSE runs on Windows 98, Windows 2000, Windows XP and Windows NT®. Source code is available so that you can customize the software to meet your unique needs. System Manager provides features such as multilingual and multicurrency capabilities, and users can choose keyboard navigation, point-and-click navigation, or both. And, it's easy to move and merge information.

TRAVERSE manages your financial information quickly, easily, and effectively. You can do quick sorts on any field in ascending or descending order with just one mouse click. In addition, TRAVERSE provides password protection by application, menu, function, and database objects. You'll also find table-driven international and industry specific language sets, and such individual workstation options as keyboard controls, toolbars, and language sets.

Business Intelligence

(AIA) Advanced Information Analyst

A Multidimensional Reporting Tool [Click to see Demo](#)

Organizations tend to grow and prosper as they gain a better understanding of their environment. Advanced Information Analyst helps you understand increasingly complex problems in a fast-paced business atmosphere, taking your TRAVERSE accounting data and turning it into powerful information to help you make better, mission critical decisions.

Advanced Information Analyst uses the latest online analytical processing (OLAP) technology to produce reports and graphs that afford a new level of insight. OLAP enables you to easily and selectively extract and view data from different points of view. You can analyze data by interacting directly with it rather than by viewing static paper reports. Get fast answers to questions such as: Are our sales promotions working? Are we attracting new customers? Are we managing our inventory properly? Advanced Information Analyst allows you to visualize your business information in charts, decomposition trees, perspective views, or grids for easy comprehension.

TRAVERSE Digital Dashboard

[Click to see Demo](#)

Included with System Manager, Digital Dashboard gives you an exclusive snapshot of key business indicators. You can personalize Digital Dashboard using over 35 pre-defined business metrics. Each user can choose which objects to view and whether to show data graphically, in text mode, or both. User settings also include the ability to set an automatic refresh interval to ensure timely, accurate information. Dashboard objects can show individual company or consolidated data in multi-company environments.

- AP Aging Analysis
- AP Invoicing Analysis
- AP Payment History
- AP Purchase History
- AP Aging Analysis
- Daily Statistics - Purchase Orders
- Daily Statistics - Sales Orders
- Company Balances Summary
- Ratio Analysis
- Daily Sales and Profit Summary

- AP Invoice Analysis
- AR Payment History
- AR Sales History
- Current Cash Flow
- Projected Cash Flow
- CRM Opportunity Projections
- Daily Statistics - Cash Receipts
- Daily Statistics - Checks Written
- Monthly Sales and Profit Summary
- Yearly Sales and Profit Summary
- Top Ten Customers
(MTD, YTD, Total)
- Top Ten Items (MTD, YTD, Total)
- Top Ten Sales Reps
(MTD, YTD, Total)
- Top Ten Vendors (MTD, YTD, Total)

Daily Alerts and Weekly Alerts are available if using the InfoAlert product.

Info-Alert

Protecting your profits with up-to-the-minute-alerts [Click to see Demo](#)

Info-Alert is a powerful tool that monitors your business data and provides automated alerts when various business conditions are met. Info-Alert serves as a “virtual employee” that attaches to your TRAVERSE data and reviews it at scheduled intervals, reporting the information to the appropriate people.

With Info-Alert, you define a specific set of parameters. When conditions occur that meet those parameters, an alert is sent—via email or report—to those individuals assigned to receive the notification (employees, customers, vendors, etc.). There are many predefined alerts, including those in categories such as Accounts Receivable, Order Entry, Inventory and Purchasing. For each pre-defined alert, you can establish a set of criteria; for example, “Only review customers assigned to a specific sales rep.”

Info-Alert is quick and easy to install. Once it is set up, Info-Alert will run unattended, reviewing your data for information you have requested. Most other Microsoft or ODBC-compliant databases in your office can easily be connected and mapped to Info-Alert to allow you to generate alerts based on your company specific data. Info-Alert can also be configured to send dunning letters to your customers, send requests to vendors for the status of late shipments, automatically update credit hold flags in your customer record and much more.

Advanced Financial Analyst

A Microsoft Excel Reporting Tool [Click to see Demo](#)

Advanced Financial Analyst is a state of the art reporting tool that provides access to your general ledger data directly from Microsoft Excel, the most popular spreadsheet in the world.

There are two primary components to Advanced Financial Analyst: Author and Analyst. Use Author to design report templates. Begin with an existing template or start from scratch. Place entire rows and columns of information in the worksheet with user-friendly wizards. Build in filters that allow users to specify report criteria when viewing the report. Add drill down capability to a report by simply checking a box. Or, create a data source to be used in conjunction with Excel pivot tables. Author makes template creation easy thanks to innovative programming that was done using 100% Microsoft tools.

Use Analyst to view reports using your templates. Simply open the template, select any filter criteria and run it. The report is automatically generated with new data from the selected period. This means your time is spent analyzing data, not entering it. And, because your data is in Excel, you have a full complement of tools available to you. Perform 'what-if' analysis. Create charts and graphs. Or, distribute the information in native Excel, HTML or text formats. It's all fast and easy because your data is in Excel.

TRAVERSE for Financial Management

- General Ledger
- Advanced Financial Analyst
- Accounts Receivable
- Accounts Payable
- Bank Reconciliation
- Fixed Assets
- Payroll
- Direct Deposit

General Ledger

Get Vital information today; make the best decisions for tomorrow [Click to see Demo](#)

TRAVERSE® opens the door to a world of flexibility and productivity. The General Ledger module lets you report, compare, and analyze key information and statements - critical to your company's success.

Since TRAVERSE was developed with SQL Server, Microsoft Access® and Visual Basic™, it provides a seamless interface to other Microsoft Office products such as Word, Excel, and Mail as well as HTML language for the Internet. You can export reports - including headings, data and formulas - with just a click! And training is easy because you're working with tools you're already familiar with.

The simple design philosophy of Access makes it easy to use for everyone, from beginner to expert. TRAVERSE and Access team up to get you from where you are to where you need to be.

TRAVERSE General Ledger provides 30-character account masks and 7 user-defined segments. You can have up to 367 periods per year open and maintain history for an unlimited number of years. You can even use the multilingual capabilities of TRAVERSE to do international reporting; work and report in the language of choice and switch between installed language sets at will. Like all Open Systems products, source code is available.

Customize your GL accounts while tracking years of account balances.

Advanced Financial Analyst

A Microsoft Excel Reporting Tool [Click to see Demo](#)

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Use Analyst to view reports using your templates. Simply open the template, select any filter criteria and run it. The report is automatically generated with new data from the selected period. This means your time is spent analyzing data, not entering it. And, because your data is in Excel, you have a full complement of tools available to you. Perform 'what-if' analysis. Create charts and graphs. Or, distribute the information in native Excel, HTML or text formats. It's all fast and easy because your data is in Excel.

Financial statements are presented directly in MS Excel, where they can be further manipulated, published to an intranet, emailed to others or included in MS Word documents.

Accounts Receivable

Manage your cash, know your customers, analyze performance and trends [Click to see Demo](#)

TRAVERSE® provides the features you want and the tools you need to run your business more effectively. Source code is available so you can customize the software to meet your unique needs. TRAVERSE was developed with SQL Server, Microsoft Access® and Visual Basic™, so the user benefits from a seamless interface to other Microsoft Office products such as Word, Excel, and Mail as well as HTML language for the

Internet. Working with the tools you're already familiar with makes training a breeze!

Accounts Receivable offers multilingual and multicurrency capabilities. You can use a mouse and/or a keyboard for navigation and data entry, and you can customize by user which fields to stop at on data entry screens. Historical information for an unlimited number of years can be viewed in detail or summary.

There are other advantages to working with a product developed with Access. Its built-in intelligence senses what you want to do and produces the results you're looking for. Routine tasks become automatic; complex jobs become less complex. TRAVERSE manages your financial information quickly, easily, and effectively.

TRAVERSE provides fast customer lookup with a single mouse click.

Accounts Payable

Tracking obligations to suppliers, controlling cash flow, and making sound cash management decisions are now easier than ever. [Click to see Demo](#)

You need a strong financial management system in order to meet the demands placed on your business. One that's designed to provide vital information quickly and easily. TRAVERSE® is the system you need.

TRAVERSE was developed with SQL Server, Microsoft Access, and Visual Basic™. It provides a seamless interface to other Microsoft Office products like Word, Excel, and Mail as well as HTML language for the Internet. You'll be connected to all members of the Microsoft Office family, making it easy to share your information. TRAVERSE provides multilingual and multicurrency capabilities, making it the software of choice for international business.

Data entry in Accounts Payable can be done with the mouse and/or keyboard; tab stops can be individualized for quick entry. You can view historical data for an unlimited number of years in detail or summary, and you can view and select payables to be released for payment. As with all Open Systems products, source code is available.

Bank Reconciliation

Keep Tight Control Over Your Company's Cash; Manage Capital Wisely [Click to see Demo](#)

TRAVERSE® Bank Reconciliation application helps you streamline and improve the reconciliation of bank statements with general ledger bank accounts. It makes important updates to TRAVERSE General Ledger and receives timely entries from the other applications.

TRAVERSE was developed with SQL Server, Microsoft Access® and Visual Basic™. As a result, the user benefits from a seamless interface to products such as Word, Excel, and Mail as well as HTML language for the Internet. You'll be connected to all members of the Microsoft Office family, making it easy to share your information. In addition, TRAVERSE provides multilingual and multicurrency capabilities.

With Bank Reconciliation, you'll know which checks have cleared, which transactions are outstanding, which bank accounts contain what amounts, and exactly where your money is. Find errors and record differences between your books and the bank easily with two types of reconciliation from the Reconciliation Report - book-to-bank and bank-to-book. Reconciling is fast and simple. You can clear transactions with a single mouse click--line by line by a specific range of checks or all at once. If you make a mistake, reversing a selection is just as easy.

You need to make the best decisions about the day-to-day operations of your business. TRAVERSE Bank Reconciliation gives you the accurate information you need to make the most of your cash. Using multiple bank accounts for Accounts Receivable/Sales Order deposits and Accounts Payable/Purchase Order checks gives you the flexibility to receive money and to disburse money from different accounts.

Fixed Assets

Make sound management decisions, meet government reporting requirements, save time. [Click to see Demo](#)

You need to analyze the tax and cash-flow implications of assets before you acquire them. Once you have them, you need to track their valuation and depreciation. TRAVERSE Fixed Assets gives you the power to do just that. It will help you make wise decisions about when to buy, when to lease, and how to manage your capital for maximum return. You'll also have the full range of financial and management reports you need to manage your investments and meet tax reporting requirements.

TRAVERSE provides the capability for Internet/Intranet access and provides a seamless interface to Microsoft Office products such as Word, Excel, and Mail. You'll have the forecasting tools you need to evaluate leases, amortize loans, and experiment with depreciation strategies before you make a capital commitment.

Keep an eye on your depreciation options with four depreciation books that let you track four sets of depreciation information. You can also retire assets at any time. Track the difference between estimated depreciable and actual service life and calculate the cost or proceeds from the retirement of an asset.

You'll stay up to date with tax law changes. Fixed Assets provides a set of IRS-supplied depreciation tables and supports MACRS, ACRS, straight line, sum-of-the-year digits, and declining balance recovery methods.

Flexible tables help you make changes easily to stay current with tax laws.

Payroll

Payroll Management Made Easy [Click to see Demo](#)

TRAVERSE® Payroll keeps you current with government reporting requirements while giving you total flexibility. In addition to printing checks, you need to maintain detailed records with clear audit trails, track sick and vacation days, and keep up to date with tax law changes. TRAVERSE Payroll can handle it all. It also enables you to analyze payroll expenses and employee productivity as well as control costs and review expense distribution.

TRAVERSE was developed with SQL Server, Microsoft Access® and Visual Basic™, so you have a seamless interface to Microsoft Office products such as Word, Excel, and Mail as well as HTML language for the Internet. You can export reports - including headings, data, and formulas - with just a click!

With this module, you can produce detailed reports to help you plan and generate a budget. Manage Your expenses efficiently by tracking FUTA, SUI, Medicare, and Social Security, as well as earnings by department. You decide whether to calculate scheduled deductions as a fixed amount, a percentage of gross pay, an hourly rate, or a declining balance. You can easily produce W-2s - printed on forms, mailers, or stored on magnetic media to meet federal requirements.

You'll have the flexibility to set up your payroll according to your terms. Define pay codes for regular, overtime, double-time, sick, vacation time, or any other payment method for hourly employees. An unlimited number of user-definable deductions are allowed per company, as well as taxable and/or nontaxable earnings codes and an option for fixed federal, state, and local withholdings. You can edit manual checks or system calculated checks prior to printing.

Direct Deposit

Choices and Flexibility for Employers and Employees [Click to see Demo](#)

TRAVERSE Direct Deposit makes payday easier for everyone. Your employees don't need to worry about getting their paychecks to the bank on time—and standing in line when they get there. Direct Deposit, a TRAVERSE Payroll companion module, makes life a whole lot easier. Give your employees another benefit: peace of mind. They'll know that their paychecks will be deposited directly to their bank account. And, you'll get more productivity on payday.

With TRAVERSE Direct Deposit, you can give employees the choice of whether or not to participate. They

can also choose to have a portion of their pay deposited to their accounts and receive the remainder as a live check, and they may elect to split deposit amounts between six different bank accounts in up to six different banks.

The employee direct deposit setup form allows you to choose the type of account (checking, savings, paycheck), account number to deposit to, routing code, and percent to deposit to each account. If you wish, you can also split the deposit by amount instead of percent.

TRAVERSE for Distribution

- Sales Order
- Inventory
- Purchase Order
- Bill of Materials/Kitting
- TRAVERSE Warehouse Management
- TRAVERSE Distribution Requirements Planning

Sales Order

Order entry, picking, tracking, billing ... and beyond [Click to see Demo](#)

TRAVERSE® Sales Order offers a host of features to improve your efficiency and increase your flexibility. Sales Order helps you keep your customers happy by handling their orders promptly and correctly. Remaining inventory balances appear on the screen. Backorder information is right at your fingertips so you'll know exactly what's ordered and when it will ship. And, you can print an online invoice or picking slip with just a click.

With TRAVERSE Sales Order, you'll have quick lookup based on customer or transaction. You can enter, edit, and view invoices from a single screen, and you'll have access to all Accounts Receivable reports and inquiries. In addition, Sales Order provides the option for two-way split commissions and multiple tax locations per tax group.

Add, change, or delete codes for your general ledger distribution accounts or set up a selection of different receivable accounts. These general ledger accounts are used when transactions are posted for the customer. Sales Order provides the capability to assign distribution codes to customers when you set up customer records; then when you post transactions that involve the customers, transaction information moves directly to the accounts you specify for the associated distribution code.

Inventory

Make a positive impact on your bottom line. [Click to see Demo](#)

You need to track every aspect of your inventory. You need to know what you have in stock, how much it's worth, and where it's located. You can do it with the TRAVERSE Inventory application. TRAVERSE was developed with SQL Server, Microsoft Access® and Visual Basic™. It provides a seamless interface to Microsoft Office products and also features multilingual/multicurrency capabilities. Organizations running Windows 98, Windows 2000, Windows XP, Windows NT, and other leading systems will benefit from the great array of features TRAVERSE offers.

TRAVERSE lets you closely monitor inventory movements by tracking detailed inventory history; then, use the Inventory Movement Report to identify your best products and to understand their purchase/sales cycles. You can even spot seasonal demand patterns. The Valuation Report summarizes the value of the items you have on hand and the profit on items sold during the year. With TRAVERSE Inventory, you'll be able to make informed buying and selling decisions, improve customer service, and save money. Like all Open Systems products, source code is available.

Purchase Order

Take complete control - every step of the way! [Click to see Demo](#)

From the moment you decide to buy through the time the purchase is fully received, TRAVERSE® Purchase Order gives you the power to take charge of purchase order processing.

Source code is available so that you can customize the software to meet your unique needs. TRAVERSE also provides a seamless interface to products such as Word, Excel, and Mail as well as HTML language for the Internet. You'll be connected to all members of the Microsoft Office family, making it easy to share your information. In addition, TRAVERSE provides multilingual and multicurrency capabilities, making it the software of choice for international business.

Purchase Order gives you the features and functions you need to keep a watchful eye on the goods and services your company receives. You detect shortages and incorrect invoices so that you only pay for the items you've received. You can specify, confirm, and track every detail of an order you place with a vendor. You can indicate how you would like your goods shipped. You can confirm when, how many, and how much. And most importantly, you can track your original order until it's completed.

Bill of Materials/Kitting

Providing the power to save time and reduce errors [Click to see Demo](#)

Much of the success of your manufacturing business depends on your ability to supply existing customers and attract new customers with the right products at the right time for the right price. TRAVERSE Bill of Material/Kitting can help you do just that. It is a fully integrated application that allows wholesale and retail distributors as well as light manufacturers to define, build, and sell 'kitted' inventory items based upon a Bill of Material-like formula. Bill of Materials/Kitting is fully integrated with TRAVERSE Inventory and Sales Order.

Increase the number of options you can offer by utilizing the Bill of Materials/Kitting component information. It gives you the ability to mix and match related assemblies into a single kit. Easily determine whether you have enough stock to assemble an order, or use the "available to build" function to determine how many of any given item you can build. It's easy to review a bill of material or print a list of all components required for a particular assembly.

Improve your bidding success. You can quickly assess the cost of assemblies and then use the Transaction History Report in TRAVERSE Inventory to compare anticipated costs with the actual costs associated with similar assemblies. You'll also improve accuracy and save time.

TRAVERSE Warehouse Management

[Click to see Demo](#)

TRAVERSE Warehouse Management is a comprehensive solution expressly designed to give you precision inventory handling. Dramatically improve your efficiency in picking, packing, and shipping orders by maximizing the productivity of your warehouse staff. Consistently prompt order fulfillment is within your reach with TRAVERSE Warehouse Management.

Inquiry Functions:

- Item Quantity Inquiry
- Detail History Inquiry
- item Explorer Inquiry

Daily Work Functions:

- Release Orders
- Picking List
- Export Released Orders
- Record Picked Orders
- Receive Goods

- Location Transfers
- Post Location Transfers
- Adjustments
- Post Adjustments
- Move Quantities
- Receive Production

Reports and Worksheets:

- Location Transfers Journal
- Location Transfers Report
- Location Transfers Packing List
- Adjustments Journal
- Detail History Report

Periodic Processing:

- Periodic Maintenance

Setup and Maintenance:

- Bins
- Containers
- Options and Interfaces
- Batch Codes

Master Lists:

- Bin List
- Container List
- Batch Codes List

TRAVERSE Distribution Requirements Planning

A true planning tool that gives you the information you need to solve tomorrow's problems ... today [Click to see Demo](#)

Most inventory problems would be a lot easier to solve if you could only see them coming. Distribution planning involves managing sales forecasts, creating master schedules, and running DRP. In short, balancing future supply and demand. TRAVERSE Distribution Requirements Planning (DRP) enables you to plan for

the future. You'll be able to meet market demand and address your company's sales plan.

With TRAVERSE Distribution Requirements Planning, you can determine the items you need and when you need to purchase them in order to fulfill the sales goals set forth in your forecasts.

At the heart of the system is the DRP report, a time-phased glimpse of the future demand for inventory items. Combining the best of both worlds, this report features two formats for users: one for those who prefer bucket less reporting and one for those who prefer the standard DRP report based on daily, weekly, or monthly summaries.

Forecasting can be a challenge, but the TRAVERSE software tools make the job easier than ever. Forecasts can be automatically created for individual items based on current history using multiple methodologies. Forecast flexibility is built in at every step of the process.

TRAVERSE for Manufacturing

- Manufacturing - bill of Material
- Manufacturing - Bill of Materials
- Manufacturing - Material Requirements Planning
- Manufacturing - Routing and Resources
- Manufacturing - Production

Manufacturing - bill of Material Manufacturing - Bill of Materials

A comprehensive base for a complete, easy-to-use manufacturing solution [Click to see Demo](#)

The key to a successful manufacturing software implementation begins with the Bill of Materials. A bill of materials (BOM) defines the products structure in terms of materials and provides an optional connection to plant resources such as machinery, tooling, and labor defined by a bill of routing. The Bill of Materials application provides a solid base for production activity to be defined, tracked and reviewed. It also enables more advanced software such as MRP and CRP to be properly utilized. TRAVERSE Manufacturing Bill of Materials is the place to start.

The software functionality provided gives you the tools you'll need to define both the simplest and most complex bills of material. Designed to allow you to start simple and build from there, the maintenance of the bills of material provides advanced features such as detailed routing, multiple routing definition, mixed unit of measure, cross group costing, scrap tracking, and total visual documentation.

Revision numbers, effective dates, and drawing numbers help to further define the BOM. You'll find that the sophisticated feature set built into this product is comparable to software that is priced substantially higher.

Yet, you can set up simple, material-only bills quickly and with minimal work.

Features like a text file import enable you to bring engineering bills directly into your current BOM database. Standard cost maintenance, global component replacement, BOM change history, and a variety of inquiry functions give you automated update abilities and quick access to vital information.

The Available to Promise and Component Availability functions take you beyond typical BOM functionality, giving you valuable insight into current and future availability.

Manufacturing - Material Requirements Planning

A true planning tool that gives you the information you need to solve tomorrow's problems - today [Click to see Demo](#)

Most manufacturing problems would be a lot easier to solve if you could only see them coming. Materials planning involves managing sales forecasts, creating master schedules, and running MRP. In short, balancing future supply and demand. TRAVERSE Material Requirements Planning enables you to plan for the future. You'll be able to meet market demand and address your company's production plan.

With TRAVERSE Material Requirements Planning, you produce a Master Production Schedule to plan the manufacturing of finished goods in order to meet the expected demand from your sales forecasts. Next, you use MRP functionality to determine the raw materials you need and when you need to purchase them in order to fulfill the production goals based on the Master Production Schedule.

At the heart of the system is the MRP report, a time-phased glimpse of the future demand for material components and assemblies. Combining the best of both worlds, this report features two formats for users: one for those who prefer bucket less reporting and one for those who prefer the standard MRP report based on daily, weekly, or monthly summaries.

Forecasting can be a challenge, but the TRAVERSE software tools make the job easier than ever. Forecasts can be automatically created for individual parts and assemblies based on current history using multiple methodologies. Forecast flexibility is built in at every step of the process.

Manufacturing - Routing and Resources

A complete set of tools to define how and what you do [Click to see Demo](#)

The labor, machinery, and tooling elements of manufacturing can be as crucial as the component materials you use. These are the elements that can cause production to come to a crawl and cause costs to far exceed projections. The TRAVERSE Routing and Resources application provides the functionality to define these

important pieces of your manufacturing software solution.

Working with the Bill of Materials module, the Routing and Resources application defines the elements such as work centers, labor, machinery, and tooling. In terms of costs and times, these elements make up the process side of the manufacturing bill of materials.

By breaking down the process in the labor types, machine groups, and tooling, Routing and Resources enables you to define operations as a combination of these elements. Routings are then created as a set of step-by-step operations and can be used in the Bill of Materials application without needing to be recreated every time.

The system allows for the definition of queue time, setup time, run time, wait time and move times. All times are defined in terms of seconds, minutes, or hours. Overlap logic is used to determine the rate of pass-through. Flexible costing algorithms can be set up for labor and machinery. Overhead methods can be unique for each work center.

Routing and Resources also provides a sophisticated base for future customization with a comprehensive tooling database, labor and machinery pricing algorithms, and a complete shop calendar feature.

From Tooling to Labor, the Routing and Resources module is flexible enough to grow with your company.

Manufacturing - Production

Keep your fingers on the pulse of production [Click to see Demo](#)

Production is where it all comes together. Your software must be able to tell you today's production status, what is going to happen next, and what happened yesterday. The TRAVERSE Manufacturing Production application is up to the test. Online inquiry into existing production orders shows percentage complete based on time and materials and gives you detailed information of the status of each production process.

Once created, production orders can be completely edited via the visual editor in a drilldown manner for the flexibility many manufacturing environments require. Activity recording can be imported from an external source such as an automated time card or bar code data collection system, or it can be entered manually.

A variety of worksheets can assist you in this process. Each one has a specific focus in terms of what to pull, which operation to run, and where to go next. Special worksheets help expedite subcontracted processes.

Visual tools such as videos and pictures are readily available to assist in the process. A sophisticated

dispatch process allows you to set the sequence of for each process and keep things moving smoothly.

Extensive variance reporting enables you to see when, where—and, most importantly—why variances took place in terms of time, usage quantities, and final production.

TRAVERSE for e-Business

- eShopping Cart - B2C
- eCustomer Inquiry
- eCustomer Order
- eSales Rep
- eProject Cost
- eManager

TRAVERSE eBusiness Solutions were built using 100% Microsoft technology. These platform-independent, feature-rich, competitively priced solutions for growing businesses allow you to streamline key businesses processes with TRAVERSE accounting applications.

Maximize efficiency and make it easier to do business with customers, vendors and partners using these TRAVERSE eBusiness Solutions:

eShopping Cart - B2C

Your online solution for business success

TRAVERSE Business-to-Consumer (B2C), or Shopping Cart, integrates directly with the award-winning TRAVERSE Client/Server accounting platform; you can automate online ordering processes and remove time-consuming multiple manual entry processes by tying your front-end sales and order processes to your back-end accounting system.

Benefits

- Integrated to TRAVERSE back office accounting suite
- Accessible via a web browser - from any location
- Reach a larger and broader audience for your products and services
- Capture prospects and repeat business more effectively
- Offer worldwide Internet access to your products and services
- Provide a 24/7 electronic shop front

Functions

- Shopping Cart/Purchasing
- Manage a Customer Wish List of items
- Up-Sell/Cross-Sell capability
- Order Inquiry Control
- Credit Card Processing via VeriSign
- Direct Order Processing to TRAVERSE Accounting Software for shipping control

Key Features

- Custom Searches
- Online campaigns and promotions
- One-Click
- Associate product accessories to major product lines
- Multi-delivery point addressing
- Secured transaction control

Architecture Highlights

Multi-tiered architecture utilizing:

- Microsoft Windows 2000 Server
- Microsoft SQL Server
- Microsoft IIS
- Encrypted security where appropriate
- Flexible database structure
- Multi browser support
- Multilingual
- Scaleable architecture
- Customizable

Installation Options

- Hosted in a data center
- Single database - fully integrated to TRAVERSE accounting applications
- Purchase or lease finance options
- Multi-database support for added security between internet and back office systems

eCustomer Inquiry

Instant, online account access for your customers; you save time and reduce overhead costs

Provide an instant response to your customer's account information inquiries with TRAVERSE eCustomer Inquiry. Because your customers have this self service capability, you have less operating expenses for your company and fewer calls to your customer service department. Integrating eCustomer inquiry into your TRAVERSE system gives your business a vast competitive advantage: real time information is at your fingertips.

Benefits

- Full Integration with TRAVERSE applications
- Saves time for both you and your customer
- Improves your customer service
- Cuts overhead costs by reducing the need for costly internal administrative resources to answer phones and respond to customer inquiries
- Give your customers, partners and suppliers access to TRAVERSE data via Internet
- Flexible reporting - ease of access to data
- Accessible via web browser - from any location

Functions

- Accounts Information
- Aged Trial Balance
- Invoice History
- Payment History
- Reprint Invoice
- Online Help

Key Features

- Secured access to data
- Conduct wild card searches
- Drilldown capabilities
- Realtime information can be accessed around the clock for quick response

Architecture Highlights

Multi-tiered architecture utilizing:

- Microsoft Windows 2000 Server
- Microsoft SQL Server
- Microsoft IIS
- Encrypted security where appropriate
- Flexible database structure
- Multi browser support
- Multilingual
- Scaleable architecture
- Customizable

Installation Options

- Hosted in a data center
- Single database - fully integrated to TRAVERSE accounting applications
- Purchase or lease finance options
- Multi-database support for added security between internet and back office systems

eCustomer Order

Your customers enter their orders online; you save time and administrative overhead

TRAVERSE eCustomer Order offers your customers the opportunity to directly enter their orders over the Internet in a secured environment. In turn, you save time and greatly increase your level of customer service.

Benefits

- Full Integration with TRAVERSE applications
- Give your customers, partners and suppliers access to TRAVERSE data via the Internet
- Accessible via a web browser - from any location
- Improves your customer service
- Cuts administrative overhead costs by reducing the need for costly internal administrative resources
- Instant updates to TRAVERSE - no need to worry about double entry
- Flexible reporting - ease of access to data

Functions

- Order Entry

- My Pending Order
- Pending Orders
- Open Orders

Features

- Flexibility to run a special Internet promotion
- Interface with VeriSign for credit card processing and receive VeriSign reports
- Automated order entry
- Post online payment
- Customers enter their own orders over the Internet in a secured environment
- Online banking via the Aged Trial Balance
- Conduct wild card searches
- Real time information can be accessed around the clock for quick response
- Advanced inventory search lets you search for an item by ID number, description, group code or serial number
- Use tax groups that are already stored in TRAVERSE
- Option to create customized inventory catalogs for each of your customers

Architecture Highlights

Multi-tiered architecture utilizing:

- Microsoft Windows 2000 Server
- Microsoft SQL Server
- Microsoft IIS
- Encrypted security where appropriate
- Flexible database structure
- Multi browser support
- Multilingual
- Scaleable architecture
- Customizable

Installation Options

- Hosted in a data center
- Single database - fully integrated to TRAVERSE accounting applications
- Purchase or lease finance options
- Multi-database support for added security between internet and back office systems

eSales Rep

Your Sales reps access customer accounts ... anywhere, any time

Your sales representatives can't be in the office every minute of every day. And with TRAVERSE eSales Rep, they don't have to be. eSales Rep gives your sales staff online, instant access to customer accounts 24 hours a day, 7 days a week.

Benefits

- Sales reps can enter customer orders when they are away from the office: no phone calls, no faxes
- Double-check existing orders prior to contacting a client
- Get instant answers to customer inquiries online, eliminating the need to consult other employees on order status or inventory availability
- Full Integration with TRAVERSE applications
- Flexible reporting - ease of access to data
- Accessible via web browser - from any location
- Improves your customer service
- Cuts overhead costs by reducing the need for costly internal administrative resources to answer phones and respond to customer inquiries
- Instant updates to TRAVERSE - no need to worry about double entry

Functions

- Account Information
- Aged Trial Balance
- Invoice History
- Payment History
- My Pending Orders
- VeriSign Report

Key Features

- Interface with VeriSign for credit card processing and receive VeriSign reports
- Post on-line payments
- Secured access to data
- Conduct wild card searches
- Real time information can be accessed around the clock for quick response

- Perform advanced inventory searches and see the additional descriptions and inventory pictures stored in TRAVERSE

Architecture Highlights

Multi-tiered architecture utilizing:

- Microsoft Windows 2000 Server
- Microsoft SQL Server
- Microsoft IIS
- Encrypted security where appropriate
- Flexible database structure
- Multi browser support
- Multilingual
- Scaleable architecture
- Customizable

Installation Options

- Hosted in a data center
- Single database - fully integrated to TRAVERSE accounting applications
- Purchase or lease finance options
- Multi-database support for added security between internet and back office systems

eProject Cost

Apply time to projects and check on their progress ... anywhere, any time

TRAVERSE eProject Cost addresses the requirements of companies that need to apply time to a project and make inquiries on those projects. It offers employees the ability to update the status of projects easily and conveniently from any location with Internet access. Managers can check the progress of projects online and can view reports for all employees.

Benefits

- Saves data entry resources
- Speeds up billing cycle
- Flexibility for employees and managers
- Mistakes are prevented due to data entry validation

- Secure access to private data
- Tight integration with TRAVERSE Project Costing and accounting applications
- Stay current with up-to-date and detailed time records
- Improved efficiency due to smooth time entry and accurate invoicing
- Increased profitability and competitive edge

Functions

- Time Entry
- Time Journal
- Employee Detail History
- Project Status
- Project Detail

Key Features

- Employees can see their total time by day and/or by project
- Managers have the ability to review time tickets
- Employees can review their productivity and detail history reports
- Managers can view reports for all employees, including Employee Productivity, Employee Detail History, Project Status, and Project Detail
- Project reporting can be easily customized
- Built-in error checking in Time Entry for ease of use
- Employees have the ability to review their own time ticket journal

Architecture Highlights

Multi-tiered architecture utilizing:

- Microsoft Windows 2000 Server
- Microsoft SQL Server
- Microsoft IIS
- Encrypted security where appropriate
- Flexible database structure
- Multi browser support
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- Scaleable architecture
- Customizable

Installation Options

- Hosted in a data center
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eManager

Taking control of your web applications from one site

eManager provides an administrative web interface to the functions that allow you and your customer to manage access to the TRAVERSE eBusiness applications. eManager handles the overall security for the applications, including menu access and new user setup. It allows you and your customer to set up logins and permissions that determine a user's access to account information, inventory information, and order entry. Because eManager is integrated with TRAVERSE Accounting Software, you can leverage the power of the TRAVERSE administrative functions.

Feature and Benefits

- You assign one "administrator" login to your customer; the administrator can then log in to the system and add their own users
- Administrator has the flexibility to restrict other users to certain menu items
- Users can be categorized into "groups" when logins are assigned so that all members of a particular "group" can access the same information and functionality within the eBusiness applications

Architecture Highlights

Multi-tiered architecture utilizing:

- Microsoft Windows 2000 Server
- Microsoft SQL Server
- Microsoft IIS
- Encrypted security where appropriate
- Flexible database structure
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Installation Options

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TRAVERSE for CRM

Customer Relationship Management
Sales
Customer Service
Marketing

Customer Relationship Management

Identify and attract profitable customers; manage the complete sales cycle [Click to see Demo](#)

A marketing department needs to provide strong leads to the sales group; this may involve a number of activities designed to initiate a relationship with prospects, including advertising, telemarketing, direct mail, special events and more. TRAVERSE Customer Relationship Management (CRM) gives you seamless control of your marketing programs and lets you do an online analysis of their effectiveness.

TRAVERSE CRM then guides your sales team through every aspect of the sales cycle, enabling them to qualify the sales opportunities that will bring maximum revenue with minimum resources and within time constraints. A real-time integration to other TRAVERSE applications provides access to ERP data such as open invoices, sales history, etc.

You can maintain unlimited contact names, methods (phone, email, fax, etc.) and user-defined fields for contacts and contact names. You'll be able to define campaign types such as Print, Direct Mail, Radio, etc. and maintain your campaign dates, costs and responses. Receive, categorize and refer opportunities, and analyze your campaigns by optionally assigning values and campaign references.

Sales

Guiding you through every aspect of the sales cycle

Every business needs to qualify sales opportunities that will bring maximum revenue. TRAVERSE CRM Sales gives you the power to do just that—with minimum resources and within time constraints.

Benefits:

- Flexible Reporting
- Accessible via a web browser - from any location
- Customizable - see only what you need
- Easy-to-use system for tracking sales activities and opportunities
- Gain access to corporate financial data

Functions:

- Company Management
- Contact Management
- Product Catalog
- Opportunity Forecast
- Opportunity Management
- Activity and Time Management
- Territory Alignment and Control
- Lead Assignment and Profiling
- Sales Analysis and Reporting

Key Features

- Multi-company/contact structure to manage:
 - Prospects
 - Company contacts
 - Third party relationships (resellers, distributors, partners, etc.)
- Fully secured by sales territory or user
- Complete customer profile of information
- Activity management (meetings, call-backs, etc.)
- Opportunity forecasting and control
- Sales force automation

Architecture Highlights

Multi-tiered architecture utilizing:

- Microsoft Windows 2000 Server
- Microsoft SQL Server

- Microsoft IIS
- Encrypted security where appropriate
- Flexible database structure
- Multi browser support
- Multilingual
- Scaleable architecture
- Customizable

Installation Options

- Hosted in a data center
- Single database - fully integrated to TRAVERSE accounting applications
- Purchase or lease finance options
- Multi-database support for added security between internet and back office systems

Customer Service

Exceed expectations while managing customer support

Your customer service representatives need access to information about your clients in order to effectively meet and exceed set service levels. TRAVERSE CRM Customer Service empowers your service reps with relationship information that extends back to the very first contact with the customer.

Benefits

- Personalize customer contacts through the display of relevant information
- Track issues on a timely basis
- Share knowledge and responsiveness with an extensive knowledge base
- Integrated to TRAVERSE back office accounting suite
- Flexible reporting - ease of access to data
- Ease of use - single screens
- Accessible via a web browser - from any location
- Customizable

Functions

- Issue/Inquiry Reporting
- Contact Management

- Escalation Control
- Issue Management
- Support Knowledge Base
- Satisfaction Survey Management

Key Features

- Integrated to Marketing database for profile management and dynamic up-sell/cross-sell capabilities
- Integrated to Sales for the ability to submit leads
- Manage the details of a call with unlimited text input
- Integrated to Activity Manager for call-back control (improves customer service)
- Multi levels of issues escalation
- Flexible Reporting
- Time Tracking
- Knowledge base with extensive search capability

Architecture Highlights

Multi-tiered architecture utilizing:

- Microsoft Windows 2000 Server
- Microsoft SQL Server
- Microsoft IIS
- Encrypted security where appropriate
- Flexible database structure
- Multi browser support
- Multilingual
- Scaleable architecture
- Customizable

Installation Options

- Single database - fully integrated to TRAVERSE accounting applications
- Purchase or lease finance options
- Multi-database support for added security between internet and back office systems

Marketing

Identify and attract profitable, potential and ongoing customers

A key function of a marketing department is to provide qualified leads to the sales group; this may involve a number of activities designed to initiate a relationship with prospects, including advertising, telemarketing, direct mail, special events and more. TRAVERSE CRM (Customer Relationship Management) Marketing gives you seamless control of your marketing programs and lets you do an online analysis of their effectiveness.

Benefits

- Integrated to TRAVERSE back office accounting suite
- Flexible reporting - ease of access to data
- Accessible via a web browser - from any location
- Create targeted campaigns easily
- Track campaign results as they occur, real-time
- Identify profitable campaigns by tracking lead sources to sales activities
- Capture market intelligence

Functions

- Campaign Management
- Event Control
- Marketing Knowledge Base
- Lead Control
- Opportunity Control
- Interface to Internet requests for inquiry control

Key Features

- Multi campaign types
 - Telemarketing/scripts
 - Mail Merge
 - Fax
 - email
- Flexible target profiling options
- Integrated to Internet web inquiry forms
- Marketing Knowledge Base
- Event Tracking and Registration
 - Seminars

- Tradeshow
- Meetings
- Import external contact lists
- Back office integration to other CRM applications

Architecture Highlights

Multi-tiered architecture utilizing:

- Microsoft Windows 2000 Server
- Microsoft SQL Server
- Microsoft IIS
- Encrypted security where appropriate
- Flexible database structure
- Multi browser support
- Multilingual
- Scaleable architecture
- Customizable

Installation Options

- Hosted in a data center
- Single database - fully integrated to TRAVERSE accounting applications
- Purchase or lease finance options
- Multi-database support for added security between internet and back office systems

TRAVERSE Advanced Reporting

TRAVERSE Digital Dashboard
Info-Alert
Advanced Financial Analyst
(BI) Business Intelligence
(AIA) Advanced Information Analyst

TRAVERSE Digital Dashboard

Included with System Manager, Digital Dashboard gives you an exclusive snapshot of key business indicators. You can personalize Digital Dashboard using over 35 pre-defined business metrics. Each user can choose which objects to view and whether to show data graphically, in text mode, or both. User settings also include the ability to set an automatic refresh interval to ensure timely, accurate information. Dashboard

objects can show individual company or consolidated data in multi-company environments.

- AP Aging Analysis
- AP Invoicing Analysis
- AP Payment History
- AP Purchase History
- AP Aging Analysis
- AP Invoice Analysis
- AR Payment History
- AR Sales History
- Current Cash Flow
- Projected Cash Flow
- CRM Opportunity Projections
- Daily Statistics - Cash Receipts
- Daily Statistics - Checks Written
- Daily Statistics - Purchase Orders
- Daily Statistics - Sales Orders
- Company Balances Summary
- Ratio Analysis
- Daily Sales and Profit Summary
- Monthly Sales and Profit Summary
- Yearly Sales and Profit Summary
- Top Ten Customers (MTD, YTD, Total)
- Top Ten Items (MTD, YTD, Total)
- Top Ten Sales Reps (MTD, YTD, Total)
- Top Ten Vendors (MTD, YTD, Total)

Info-Alert

Protecting your profits with up-to-the-minute-alerts

Info-Alert is a powerful tool that monitors your business data and provides automated alerts when various business conditions are met. Info-Alert serves as a “virtual employee” that attaches to your TRAVERSE data and reviews it at scheduled intervals, reporting the information to the appropriate people.

With Info-Alert, you define a specific set of parameters. When conditions occur that meet those parameters, an alert is sent—via email or report—to those individuals assigned to receive the notification (employees, customers, vendors, etc.). There are many predefined alerts, including those in categories such as Accounts Receivable, Order Entry, Inventory and Purchasing. For each pre-defined alert, you can establish a set of criteria; for example, “Only review customers assigned to a specific sales rep.”

Info-Alert is quick and easy to install. Once it is set up, Info-Alert will run unattended, reviewing your data for information you have requested. Most other Microsoft or ODBC-compliant databases in your office can easily be connected and mapped to Info-Alert to allow you to generate alerts based on your company specific data. Info-Alert can also be configured to send dunning letters to your customers, send requests to vendors for the status of late shipments, automatically update credit hold flags in your customer record and much more.

Advanced Financial Analyst

A Microsoft Excel Reporting Tool

Advanced Financial Analyst is a state of the art reporting tool that provides access to your general ledger data directly from Microsoft Excel, the most popular spreadsheet in the world.

There are two primary components to Advanced Financial Analyst: Author and Analyst. Use Author to design report templates. Begin with an existing template or start from scratch. Place entire rows and columns of information in the worksheet with user-friendly wizards. Build in filters that allow users to specify report criteria when viewing the report. Add drill down capability to a report by simply checking a box. Or, create a data source to be used in conjunction with Excel pivot tables. Author makes template creation easy thanks to innovative programming that was done using 100% Microsoft tools.

Use Analyst to view reports using your templates. Simply open the template, select any filter criteria and run it. The report is automatically generated with new data from the selected period. This means your time is spent analyzing data, not entering it. And, because your data is in Excel, you have a full complement of tools available to you. Perform 'what-if' analysis. Create charts and graphs. Or, distribute the information in native Excel, HTML or text formats. It's all fast and easy because your data is in Excel.

Business Intelligence

(AIA) Advanced Information Analyst

A Multidimensional Reporting Tool

Organizations tend to grow and prosper as they gain a better understanding of their environment. Advanced Information Analyst helps you understand increasingly complex problems in a fast-paced business atmosphere, taking your TRAVERSE accounting data and turning it into powerful information to help you make better, mission critical decisions.

Advanced Information Analyst uses the latest online analytical processing (OLAP) technology to produce reports and graphs that afford a new level of insight. OLAP enables you to easily and selectively extract and view data from different points of view. You can analyze data by interacting directly with it rather than by viewing static paper reports. Get fast answers to questions such as: Are our sales promotions working? Are we attracting new customers? Are we managing our inventory properly? Advanced Information Analyst allows you to visualize your business information in charts, decomposition trees, perspective views, or grids for easy comprehension.

TRAVERSE Vertical Solutions & Features

[Project Costing](#)

[Service Director/Field Service/Repair & Maintenance](#)

Point of Sale
TRAVERSE Not-for-Profit
TRAVERSE Mobile Order
Multicurrency

Project Costing

Keeping tabs on the course of jobs and projects couldn't be easier. [Click to see Demo](#)

TRAVERSE Project Costing is both a time billing and a job costing application. It is a fully integrated TRAVERSE application that addresses the needs of companies tracking the progress of projects or jobs.

The general screens allow you to define the structure of the project and to make decisions about what type of project it is, how the project levels will accrue income and costs, and how billing will be handled. The cost screens provide actual project-to-date cost information compared to estimates. The profit screens provide actual project-to-date income, cost and gross profit information compared to estimates. The history screens provide income, cost, billing and write-up/down information on a month-to-date, year-to-date, and project-to-date basis.

TRAVERSE Project Costing lets you set up projects for billing at either the project level or the phase level. You can also have projects that are speculative in nature and change them to billable projects later. A simple entry screen gives you the ability to enter estimates at the project, phase or task level; it shows both the current estimates and the revised estimates.

Service Director/Field Service/Repair & Maintenance

Streamlined, intuitive work order and service management

TRAVERSE® Service Director is a comprehensive work order and service management system equally well suited for your on-site, depot or internal company needs. Developed in Microsoft Access, Service Director is designed for a wide range of businesses including installation, repair, maintenance service, manufacturing, and construction companies. Developed as a tiered system utilizing 100% Microsoft technology, Service Director allows you to select the product level appropriate for your business needs and budget.

TRAVERSE Service Director's powerful dispatching capability offers your company unparalleled system flexibility. Quick work order entry and scheduling gives your customers fast, efficient call handling. With Service Director's work order command center concept, daily functions are quickly and easily accomplished. Flexible customer invoicing for time and materials is available for a single dispatch or a series of dispatches. As with all TRAVERSE applications, source code is available for company specific customization.

Point of Sale

Streamlining your company's sales and inventory. [Click to see Demo](#)

TRAVERSE Point of Sale (POS) is a computerized retail management system that combines a user-friendly interface with exceptional speed and flexibility. It is integrated with TRAVERSE Sales Order for a fast, efficient means of entering sales and controlling inventory. TRAVERSE POS enables your computer to operate as a cash register, offering far more capabilities than a traditional register. And, it's much easier to use.

TRAVERSE POS is the perfect solution to improve the profitability of your business. It provides streamlined transaction entry and the ability to quickly locate information through robust reporting and lookup functions. You'll be able to capture complete transaction details at the "point of sale"; transaction history and real-time database records are stored indefinitely, so your valuable data is always just a keystroke away.

When trying to locate a customer or an inventory item, simply type the first few letters of the name you are trying to locate. TRAVERSE POS instantly brings you to the correct place in the list, even if you have thousands of names to search through. Inventory items can be found by scanning with a barcode reader or by typing in the description. TRAVERSE Point of Sale also lets you look up your inventory by typing the vendor SKU, product code, or a "preferred name."

Additional Point of Sale Features:

- Function Key Driven
- Easy learning curve
- Cash drawer opens automatically following the payment of a transaction
- Prints invoices and/or receipts
- Password Protected price change
- Tracks voided transactions
- Ability to create invoices, returns, layaways, and quotes from the same menu
- Item lookups from anywhere on the POS screen
- Can be customized to fit the individual retailer's needs
- Consistent, simple-to-use screens combined with an underlying processing power
- End of the day balancing journal that prints by workstation (POS Journal)

TRAVERSE Not-for-Profit

Affordable solutions for the not-for-profit industry [Click to see Demo](#)

TRAVERSE Not-For-Profit (NFP) provides organizations with a cost-effective solution and a robust set of features frequently requested by not-for-profit organizations. TRAVERSE NFP gives you total integration to the General Ledger, Accounts Payable and Payroll modules. As with all TRAVERSE applications, source code is included.

Many NFP's choose TRAVERSE because of its capability to seamlessly export any report with the click of just one button to Microsoft Office products such as Word, Excel™ and Outlook. With TRAVERSE NFP, you can easily email your budget or financial statements to the board. Since TRAVERSE General Ledger has a flexible chart of accounts that handles up to seven segment categories and 30-character alpha-numeric numbers, you can create unlimited funds, programs, grants, activities, departments and divisions all in one place. The NFP General Ledger module also has a feature to tag an account as active or inactive so that your chart of accounts does not show inactive accounts, grants, or activities.

NFP organizations track restricted, temporarily restricted and unrestricted funds and also need to provide reports on the activity of these funds. TRAVERSE NFP tracks these funding activities and automatically creates due to/from entries as part of the process. Reports are easily formatted with the powerful built-in report writer. The cross-fiscal year reporting for financial reports and grants—conveniently located in the general ledger—is another feature that will save you valuable time.

TRAVERSE Mobile Order

Quick, Powerful, Intuitive [Click to see Demo](#)

TRAVERSE Mobile Order is designed to allow you to efficiently capture customer's orders anytime, anywhere with a mobile PDA device. The information captured about customers and orders is more valuable because it's shared with the award-winning TRAVERSE accounting platform. It decreases order-entry time and eliminates double data entry.

Your sales representatives can focus more time on selling products and less time entering orders. TRAVERSE bar codes can be printed onto labels, allowing you to quickly scan the item onto the order.

TRAVERSE Mobile Order offers two options: a tradeshow wireless option and a stand-alone option. The wireless tradeshow option allows devices to connect to the laptop to retrieve the data; the laptop is then synchronized with the TRAVERSE server. For additional mobility, you can download data from TRAVERSE directly to your stand-alone device. TRAVERSE Mobile Order utilizes Microsoft's .Net framework, is Pocket PC 2003 compliant and seamlessly integrates with many bar code scanning devices.

Key Features

- Add orders for existing customers or add new customers
- Ability to quickly add customers and ship-to's on the fly
- Automatically verifies existing customer's credit limits
- Utilizes barcode scanners to quickly enter items into the order
- Allows prepaid orders
- Synchronizes orders to TRAVERSE accounting applications on demand
- Enter and print credit memos, invoices and shipped orders

Benefits

- Improves your customer service
- Full integration to TRAVERSE accounting applications
- Bar-coding capabilities eliminate data entry mistakes
- Eliminates disparate systems and applications
- Order entry anywhere, any time for mobile sales force
- Synchronizes with TRAVERSE - no need to worry about double data entry

Multicurrency

[Click to see Demo](#)

TRAVERSE Multicurrency capabilities allow you to develop and maintain productive relationships with international customers and vendors while handling transactions in any number of currencies. Exchange rates are continuously changing, but with TRAVERSE you can easily manage your accounting procedures by defining as many currencies and rates as you wish.

Features include:

- Assign a currency to a customer or vendor to be used when they submit a payment or are invoiced or paid
- View entire customer and vendor accounts in a foreign currency. You can view all Accounts Payable and Accounts Receivable accounts in your local currency in which the transaction was made.
- Define an unlimited number of currencies; add or delete them anytime.
- You control the manner in which foreign currency amounts are rounded and posted to the database.