

## Categories and Holiday and Standing Orders

### Standing Orders Holiday Orders.

Every Cut Flower Wholesalers has their way to track their **Standing Orders** and or **Holiday Orders**. They use **Computers, Yellow Pads**, and we have seen notes on a **White Board, which looks like military code**. All done in an effort to keep track of the lifeblood of their company

### ProTrac and Category Processing

Our customers wanted a single **Modern Electronic Tool**, to handle their **Standing and Holiday Orders**. We listened to their needs and we have introduced ONE Program, **CATEGORIES**, to help our customers take control of their **Standing Orders and Holiday Orders**.

**Display One:** Each wholesaler sets up their own Names for a Category in ProTrac. Once assigned, reports can be run against that Category forever. If you wanted to know about Christmas 07 sales, simply run a report for that Category.

If you were getting ready for **Mother's Day 2009** you can run a report for **MDay2008** and ProTrac will give you a stem by stem listing of everything that was sold to every customer for **Mother's Day 2008**.

### Display One: Categories in ProTrac

Category	Description
09BLKTS	2009 BLANKET ORDERS
CHSTMS07	Christmas 2007
CHSTMS09	Christmas 09
MDAY08	Mothers Day 2008
MNDYORDR	MONDAY ORDERS
STNDORD	STANDING ORDER
THNKSG08	THANKSGIVING08
THNKSG09	THANKSGIVING 09
TSDYORDR	TUESDAY ORDER
VAL08	Valentine 2008
WK 1BLKT	Blankets 1st week of Month
WK 2BLKT	Blankets 2nd week of Month
WK 3BLKT	Blankets 3rd week of Month
WK 4BLKT	Blankets 4th week of Month

**The ProTrac Category**  
A better way to keep track of Standing Orders and Holiday Orders  
You set up your own Category which might be **Standing Orders for the week or the Thompson Wedding**. Using ProTrac's Category there is no end of the possibilities.  
If you have **20 standing orders** for a day you can release all of the orders at one time and make them into sales orders and pick tickets.

**Display Two:** ProTrac has a report that you can **Mail, Fax, Or Email** to your customers to let them know what they ordered for **Mother's Day 2008**.

### Display Two: Customer Sales by Stem for a Holiday

March 10, 2009  
A 1 CANNAN FLORAL  
7497 BRIAN CANYON  
BUFFALO, AR 98765

This Letter Report can be Faxed, E mailed, or Mailed to your customer for any upcoming holiday or event.

Thank you for making ABC Cut Flower Wholesalers your choice for Cut Flowers. As a service to you and to ensure that you have inventory on hand for the upcoming Mother's Day Holiday, we have created a report which lists all of the product that you purchased from us during Mother's Day 2008.

We hope this information facilitates your purchases from ABC Cut Flower Wholesalers. Your SR has a copy of this report. Bring this letter with you when you visit our newly remodeled display area.

Mel Carney

Previous Year's Purchases  
From: 03/10/2008  
To: 05/10/2008

This Year's Order  
Shipment Dates  
Date 1 Date 2

P/L	Item Number	Description	Quantity		
C01	CARN BUNCH	CARNATIONS BUNCH FLORAL	50	_____	_____
C01	CARN FANCY RED	CARN FANCY RED	100	_____	_____
C01	CARN SELECT	CARN SELCT	100	_____	_____
C02	CHAR ROSE 40 RED	CHARLOTTE ROSE 40 RED	210	_____	_____

**How does Categories work?** When keying the Quote, your SR would tell ProTrac that this Quote was for **Mother's Day 2010**. They can put a "?" in the Category field and the **Category Browse Drop-Down** would display. Select **Mother's Day 2010** and move on with the order.

The power of this program has now been set in motion.

Had this been a Standing Order for Monday the SR would have selected Monday Order. It is that simple.

**One program works with either Standing Orders or Holiday Orders for both Orders and Quotes.**

**The SR keys the items onto the quote and moves onto the next phone call**

### Display 3: ProTrac Order Entry

POS Part 1      pos0010a

ProTrac(R) 8.21.03      MDC

Ord Date: 02/24/2010      Sales ID: MDC      Ord Type: Q      Credit Hold: No      Credit Limit: 15000.00

Order#: 4578      Sales Rep: JON      Ord Stat: Q      Balance: 0.00

Acct No: A.J.B01      Terms: 2%10 NET30      Cat: MDAY10      Whse: TST      ShipTo: 1

Bill Name: A.J. BIRDWELL

Address: P.O. BOX 1

City: WATERTOWN

Postal Cd: 53098

Country:

Notes:

Special Ins:

DateReq:

Phone: (920) 261-3636

Fax: ( ) -

PO No.:

Job No.:

Hold Reason:

F2=Continue    ESC=Ret

Category	Description
09BLKTS	2009 BLANKET ORDERS
CHSTMS07	Christmas 2007
CHSTMS09	Christmas 09
MDAY08	Mothers Day 2008
<b>MDAY10</b>	<b>MOTHERS DAY 2110</b>
MNDYORDR	MONDAY ORDERS
STNDORD	STANDING ORDER
THNKSG08	THANKSGIVING08
THNKSG09	
TSDYORDR	
VAL08	
WK 1BLKT	
WK 2BLKT	
WK 3BLKT	Blankets 3rd week of Month

Sort/Search by:  Category     Description

OK    Cancel

### Display 4: Completed Quote Mother's Day 2010

TST-POS Part 2      pos0009

ProTrac(R) 8.21.03      MDC

Acct No: A.J.B01      Phone: (920)261-3636      Order No: 4578      Order Type: Q

Name: A.J. BIRDWELL FLORAL      Ship Name: A.J. BIRDWELL

P/L	Item Number	Description	T	Qty	SellPrice /	CoreSell	Extended	T
CUT	ANTHURIUM CHMPGNI	Anthurium Champagne / aai26	Q	100	5.09	0.00	509.00	Y
CUT	ASIATIC MULTI COLRD	MULTI COLORED ASIATIC L	Q	200	8.85	0.00	1,770.00	Y
CUT	ASIATIC ORANGE	ORANGE ASIATIC LILY 10 ST	Q	300	10.04	0.00	3,012.00	Y
CUT	ASTILBE FANAL RED	Astilbe Fanal Red	Q	250	1.82	0.00	455.00	Y
CUT	CALLA LILY WHITE	WHITE CALLA LILY PER ST	Q	300	7.91	0.00	2,373.00	Y
GER	GERBERDAISY	GERBER DAISY 6" CONTAIN	Q	400	8.98	0.00	3,592.00	Y
CO2	FRDM ROSE 60 RED	FREEDOM ROSE 60 RED	Q	300	0.74	0.00	222.00	Y
CO2	LAGUNA ROSE 40	LAGUNA ROSE 40	Q	200	0.81	0.00	162.00	Y

Line: 1    Of: 8      Sub Tot: 12,095.00      Tax: 786.18      Total: 12,891.18

Desc: Anthurium Champagne / aai26      Wght: 0.00

List: 5.09      Notes: N

CM%: 42.97

Sort    Cancel    Back    Finish

F2=Finish Order Options, ESC=Exit & Finish Later

G=Goto Line, Enter=Edit, A=Add, D=Delete, O=Line Notes

**Mother's Day 2010** is growing closer and your Cut Flower Buyer needs to know how many stems have been ordered for the Holiday and how many still need to be put onto a Purchase Order. ordered

### Display 5: Inventory Requirement Report

\*\*\* ProTrac TEST TEST TES TST 03/10/10 - 12:13  
 ProTrac(R) 8.21.03 eod0031  
 Mel

Order Requirements PAGE: 1

Order Selection: By Category - MDAY10  
 Include Quotes: Yes  
 Include Transfers: No  
 Include Returns: Yes  
 Display Order Detail: No  
 Include Deposits: No  
 Include Labor: No  
 Include Non Real Items: No  
 PO Selection: By Category - MDAY10  
 Include Planned POs: Yes  
 Inventory Selection: All Inventory  
 Include Curr Inv in Need: Yes

This report looked at all open orders and quotes to let the Cut Flower Wholesaler know what had to be ordered for the Mother's Day 2010 Holiday. Purchase Orders have not been issued at the time of this report. Your Cut Flower Buyer would run this report as the holiday approached. It does not need to be a holiday. This same report looks at all open orders and PO's along with how many stems are in the cooler.

P/L Item Number	Description	Qty On Hand	Qty On PO	Cust Qty Ordered	Qty Needed SPO
C01 CARN FANCY BLUE	CARN FANCY BLUE	483	0	50	0
C01 CARN FANCY WHITE	CARN FANCY WHITE	1315	0	200	0
C01 CARN STANDARD PINK	CARN STANDARD PINK	520	0	550	30
C02 AMBIANCE40 WHITE	AMBIANCE ROSE 40	298	0	50	0
C02 CHAR ROSE 40 RED	CHARLOTTE ROSE 40 RED	474	0	375	0
C02 KONFETTI 50	KONFETTI ROSE 50	235	0	35	0
C02 LAGUNA ROSE 40	LAGUNA ROSE 40	500	0	250	0
CUT ANEMONE MARIANNE	Anemone Marianne Blue	110	0	175	65
CUT ANTHURIUM CHMPCNE	Anthurium Champagne / aai26	105	0	150	45
CUT ASIATIC MULTI COLED	MULTI COLORED ASIATIC LIL 10 S	300	0	600	300
CUT ASIATIC ORANGE	ORANGE ASIATIC LILY 10 STM	76	0	300	224
CUT ASTILBE FANAL RED	Astilbe Fanal Red	110	0	275	165
CUT CALLA LILY WHITE	WHITE CALLA LILY PER STM	300	0	350	50

**Purchase Orders** have been created and ProTrac added the PO totals to the report. Now both the buyer and management can understand what needs to be purchased for **Mother's Day 2010**.

**It does not have to be a Holiday Order, Standing Order, or a Category.** This report can be run for all Open Orders, quotes, and Purchase Orders in a date range.

### Display 6: Inventory Requirement Report w/POs

\*\*\* ProTrac TEST TEST TES TST 03/10/10 - 12:28  
 ProTrac(R) 8.21.03 eod0031  
 Mel

Order Requirements PAGE: 1

Order Selection: By Category - MDAY10  
 Include Quotes: Yes  
 Include Transfers: No  
 Include Returns: Yes  
 Display Order Detail: No  
 Include Deposits: No  
 Include Labor: No  
 Include Non Real Items: No  
 PO Selection: By Category - MDAY10  
 Include Planned POs: No  
 Inventory Selection: All Inventory  
 Include Curr Inv in Need: Yes

For This report a Purchase Order/Orders were created for Mother's Day 2010 and ProTrac has added the stems on order to this Order Requirement Report. Note the stems on a PO show how many are on order.

**COOLER REPORT:** If you do not track stems in the cooler: Run the same report and your buyer could use the report to hand write how many stems are in the cooler. ProTrac knows what is on open orders and how many have been ordered you would run the same report and your Buyer would hand write the number of stems in the cooler. From there the buyer can determine how many more need to be ordered, of each stem

P/L Item Number	Description	Qty On Hand	Qty On PO	Cust Qty Ordered	Qty Needed SPO
C01 CARN FANCY BLUE	CARN FANCY BLUE	483	0	50	0
C01 CARN FANCY WHITE	CARN FANCY WHITE	1315	0	200	0
C01 CARN STANDARD PINK	CARN STANDARD PINK	520	0	550	30
C02 AMBIANCE40 WHITE	AMBIANCE ROSE 40	298	0	50	0
C02 CHAR ROSE 40 RED	CHARLOTTE ROSE 40 RED	474	0	375	0
C02 KONFETTI 50	KONFETTI ROSE 50	235	0	35	0
C02 LAGUNA ROSE 40	LAGUNA ROSE 40	500	0	250	0
CUT ANEMONE MARIANNE	Anemone Marianne Blue	110	225	175	0
CUT ANTHURIUM CHMPCNE	Anthurium Champagne / aai26	105	100	150	0
CUT ASIATIC MULTI COLED	MULTI COLORED ASIATIC LIL 10 S	300	200	600	100
CUT ASIATIC ORANGE	ORANGE ASIATIC LILY 10 STM	76	0	300	224
CUT ASTILBE FANAL RED	Astilbe Fanal Red	110	100	275	65
CUT CALLA LILY WHITE	WHITE CALLA LILY PER STM	300	0	350	50

For the next report ProTrac has added the customers who have ordered these stems for **Mother's Day 2010**.

These reports are just a small % of the inventory reports that ProTrac provides. You can break down sales by **Product Lines, Product Classes and Sub Classes.**

You can also break down sales by Sales Representative and Customer.

**ProTrac** supports over **190 Wholesale installations** across the country.

We have taken **20 years** of programming and installation experience and poured that knowledge into the Cut Flower Industry. **We believe that a review of the software will have you saying that ProTrac does indeed “Speak Cut Flower”**

**Display 7: Inventory Requirements with Order Detail**

Order Requirements PAGE: 3

P/L Item Number	Description	On Hand	Qty	On PO	Cust Qty Ordered	Qty Needed	SPO
CUT ASIATIC MULTI COLRD	MULTI COLORED ASIATIC LIL 10 S	300		200	600	100	

  

Order No	S	Number	Account	Sls Rpl	Sls Rp2	Sls ID	T	Qty	Ord	Qty	BO	Qty	Ship	SPO
4576	Q	AICAN01	SUE			MDC	Q	300		0		300		
4578	Q	A.J.B01	JON			MDC	Q	200		0		200		
4579	Q	AC01	SUE			MDC	S	25		0		25		
4580	Q	A.J.B01	JON			MDC	S	75		0		75		

  

*This is the same report as above, except this time you want to know who is ordering the stems. The 1st line shows a total on hand, on PO, ordered by all customers and how many are still needed to fill those orders.*

P/L Item Number	Description	On Hand	Qty	On PO	Cust Qty Ordered	Qty Needed	SPO
CUT ASIATIC ORANGE					300	224	

  

P/L Item Number	Description	On Hand	Qty	On PO	Cust Qty Ordered	Qty Needed	SPO
CUT ASTILBE FANAL RED	Astilbe Fanal Red	110		100	275	65	

  

Order No	S	Number	Account	Sls Rpl	Sls Rp2	Sls ID	T	Qty	Ord	Qty	BO	Qty	Ship	SPO
4578	Q	A.J.B01	JON			MDC	Q	250		0		250		
4580	Q	A.J.B01	JON			MDC	S	25		0		25		



If we can do this for your cut flowers, imagine what ProTrac can do for your **supply inventory**. ProTrac is set up to handle: Multiple branches, Bucket Trucks, and Bar Coding. **We can interface to your web site.** Your customers can also come into **ProLine** and book their orders **on line on the Internet**. The order goes directly into **ProLine** which is a part of **ProTrac**.