



ProTrac Software from PDSI

Professional Data Systems, Inc. is the Author and Service Provider for ProTrac®. ProTrac is an advanced business system, which is designed for the

Cut Flower Wholesale Marketplace

ProTrac is designed for flower wholesalers who needs **SOFTWARE** that is **FAST, DEPENDABLE** and is **REASONABLY PRICED**

Single Software Investment includes:

- Data Conversion
- HQ and On Site Training*
- Installation support
- Setting Up the Server & Client PCs

**Your staff is trained with your converted data*

Support after install

- 800 support line
- Software updates
- After hours support
- Future Training Classes
- Application Support and Problem Resolution

All for one low monthly support investment!!!

Categories, Colors, Varieties Order Requirement Reporting

It is May 20 and your buyer needs to review your commitments for all weddings for next weekend. The Orders/Quotes for Weddings have been placed in a **ProTrac Category** called **WEDDING**.

With CATEGORY PROCESSING all Quotes, Sales Orders, and Purchase Orders can be tracked to this Category. **Our Inventory Requirement Report** displays each Stem on a Sales Order, Quote, and any PO's that are submitted or in planning. With ProTrac your buyer, Sales Rep, and management can easily stay current on all commitments for a CATEGORY.

To make it easier for everyone to know what varieties and or Colors the customer wants; ProTrac has included Color and Variety in the Order/Quote Process.

Colors and Variety

Instead of hand written notes on an order or Sticky Note, ProTrac prints the colors directly underneath of the Stem on both the Pick Ticket and the Invoice.

This document follows a quote from the initial screen to the Quote and Pick Ticket. It also shows how Categories helps you control your Holiday and Standing Order processing. The order will include ProTrac's Color and Variety feature.

Once the quote has been entered an **Inventory Requirement Report** will be run to show you all of your commitments for next week end's **WEDDINGS**.

Our Inventory Requirement Report will report on the three Orders in our example WEDDING CATEGORY.

Call Mel Carney for an up front quote at 800-711-7374

Email melc@pdsi.com

ProTrac's Category and Quote Processing for the **WEDDING CATEGORY**

To Eliminate Hand Written Orders ProTrac Combines
Category Processing
Colors and Varieties
Order Requirement Report

The end goal is to create orders faster, reduce the time spent boxing orders, and to give your buyer the information on what stems to buy by Color and by Variety.

Your Sales Rep Sue, has created a quote for A 1 Canman. It is for the upcoming Simpson and Thompson Wedding on May 29.

This is the header screen of the Quote. Sue has placed the quote into the **WEDDING CATEGORY**.

She has keyed in a Special instruction on the quote telling you when this product has to be delivered.

She has also keyed in a **Date Required**.

Anyone looking at this order will know the date that the product has to be at the A 1 Canman for this event.

POS Part 1 pos0010a

PRO ProTrac(R) 8.22.03 MDC pos0010a

Ord Date: 03/21/2011 Sales ID: MDC Ord Type: Q Credit Hold: No Credit Limit: 12000.00
Order#: 5063 Sales Rep: SUE Ord Stat: Q Balance: 2203.66

Acct No: A1CAN01 Terms: 2%10 NET30 Cat: WEDDING Whse: TST ShipTo: 1
Bill Name: A 1 CANMAN FLORAL Ship Name: A 1 CANMAN FLORAL
Address: 749 Address: 7497 BRIAN CANYON
City: BUFFALO City: BUFFALO ST: AR
Postal Cd: 987 Postal Cd: 98765
Country: USA Country: USA

Notes: Contact Tom if there are any problems with delivery

Special Ins: Simpson and Thompson Wedding May 29, 2011

DateReq: 05/27/2011 Contact: TOM PAYNE
Phone: (504) 987-9755 Ext: State Tx Cd: Email: a1canman@aol.com
Fax: (504) 987-7766 Local Tx Cd: Taxable: No Co: ARZ
PO No.: City Tx Cd: DelMeth: P SCAC: Shp Int:
Job No.: Frght Cst: 0.00 Freight Terms:
Hold Reason: Cons: Save Back Next

F2=Continue ESC=Return

Press the down arrow to see a list of terms codes.

ProTrac's Category and Quote Processing for ProTrac's Wedding Category

ProTrac's Order Entry Screen

Your SR is booking the quote for A 1 Canman Floral. The 2nd line is for 200 Ever Young Roses

The Variety Selection Screen has a pre-set list of colors that are connected with the Rose.

There is a Down Total of Needed Colors

Each time an amount is keyed on this screen, ProTrac maintains a running total of how many colors have been selected, so far.

If the color the customer wants is not on the list – that color can be added during the order taking. When Save is selected, ProTrac returns to the next line on the Quote or Sales Order.

COLOR AND YOU'RE PICKING TICKET

This is an example of how Color is displayed for each stem on your picking ticket.

This same information can be printed on your customer's invoice.

If you make a color change that change can be made before the order is invoiced.

The Pick Ticket can be priced or not.

PRO-POS Part 2
POS Part 2 PRO ProTrac(R) 8.22.03 MDC pos0009

Acct No: A1CAN01 Phone: (504)987-9755 Order No: 5063 Order Type: Q
Name: A 1 CANMAN FLORAL Ship Name: A 1 CANMAN FLORAL

P/L	Item Number	Description	T	Qty	SellPrice /	CoreSell	Extended	T
CUT	CALLA LILY	CALLA LILY	Q	50	7.24	0.00	362.00	N
CO2	4 EVR YOUNG	4 EVER YOUNG	Q	200	1.46	0.00	292.00	N

Order No: 5063 Line: 2 Qty Ordered: 200
Item #: CO2 4 EVR YOUNG

Variety Code	Description	Qty Ord
BLACK RD	BLACK RED	0
CLASSY	CLASSY	0
FREEDOM	FREEDOM	0
GREEN	GREEN	0
KON	WHITE WITH RED TIPS	0
KONFETTI	KONFETTI	100
LAGUNA	LAGUNA	0
LAVENDER	LAVENDER	0
LEONIDES	LEONIDES	0
MADAME	MADAME	0
NOVELTY	NOVELTY	100
OCEAN	OCEAN SONG	0
ORANGE	ORANGE	0
OTHER RED	OTHER RED	0
PEACH	PEACH	0
PINK	PINK	0
PINK DARK	PINK DARK	0

Qty Allocated: 200

Total: 1,381.27
Wght: 0.00
CM%: 38.78

Cancel Back Finish

ARIZONA UNLIMITED, INC.
1425 E. WASHINGTON ST.
PHOENIX, AZ 85034
(602)271-0119

Order Date: 05/24/2011
Print Date: 05/24/2011
Print Time: 11:57 AM
Page: 1
Page: 1
Page: 1
PO#: 1
Order #: 5063
Company: ARZ
Acct #: A1CAN01
Terms: 2+10 NET30
Whse: TST

Special Instructions
Simpson and Thompson Wedding May 29, 2011

Sold To: A 1 CANMAN FLORAL
7497 BRIAN CANYON
BUFFALO, AR 98765
USA
Contact: TOM PAYNE
Phone: (504)987-9755
Picked:

Ship To: A 1 CANMAN FLORAL
7497 BRIAN CANYON
BUFFALO, AR 98765
USA
Ship Via: Customer Pickup
Time:

Sls Rep: SUE Sls ID: MDC

The Pick Ticket spells out to the pickers the Stem and Color requested by the Customer. This same information is on the invoice. Note: If a substitution has to be made the color can be adjusted before the invoice is created.

Line	P/L	Item No	Description	Bin Location	On Hand	Qty To Pick	Picked Qty	Order Qty
2	CO2	4 EVR YOUNG	4 EVER YOUNG		0	200		200
		NOVELTY	NOVELTY			100		
		KONFETTI	KONFETTI			100		
1	CUT	CALLA LILY	CALLA LILY CUT		0	50		50
		BLK EYD	BLACK EYED BEAUTY			25		
		CYRSTL BLS	CRYSTAL BLUSH			25		
3	CUT	LATHYRUS LAVENDER	Lathyrus Lavender		0	50		50
		BLUE	BLUE			25		
		PINK HOT	PINK HOT			25		
4	ETR	40 CM ROSE GROWER ASST 75	40 CM GROWER ASST 75		0	75		75
5	ETR	60 CM ROSE HOL PAK 100	60 CM ROSE HOL PAK 100		0	2		2
			25 WHT,PINK,YELLOW,PEACH, BI					
6	SYN	3208BUVAGLC14	BUD VASE, BUBBLE 6 3/8 (12)		55	30		30
7	WED	AISLEAIRUL125	AISLE RUNNER FRENCH LACE 125'		73	1		1

(Continued On Next Page...)

The ProTrac Order Requirement Report

Prior to creating the above Pick Ticket an Inventory Requirement Report was created by the buyer. The buyer wanted to see what was needed to ensure that all of the stems for **NEXT Week End's Weddings** have been covered.

The Order Requirements Set Up Screen, has a lot of options for the buyer. For this report, ProTrac will only look for **Orders - Quotes - Purchase Orders** that are listed under the **WEDDING** Category, in a date range through May 27th.

```
Professional Data Systems, Inc          PRO          05/24/11 - 11:08
ProTrac(R) 8.22.03                    eod0031
Mel
```

```
Order Requirements                      PAGE:          1
```

```
Order Selection: By Date Required - 05/24/2011-05/27/2011
Include Quotes: Yes
Include Returns: Yes
Order Category: Yes - wedding
Include Non Real Items: Yes
PO Selection: By Date Required - 05/27/2011
PO Category: Yes - wedding
Include Planned POs: Yes
Inventory Selection: All Inventory
```

Page 1 of a 2 page report
 This **Order Requirement Report** lets you and your Buyer know what has to be ordered for next week's weddings, including the color of each stem

P/L	Item Number	Description	Qty On Hand	Qty On PO	Cust Qty Ordered	Qty Needed	SPO
CO1	CARN FANCY	CARN FANCY		450	500	50	
	Vty: PINK	PINK			150		
	Vty: PURPLE	PURPLE CARNS			150		
	Vty: RED	RED			100		
	Vty: TIPPED	WHITE RED TIPPED			100		
CO1	CARN SELECT	CARN SELECT		400	450	50	
CO1	CARN STANDARD	CARN STANDARD		260	0	0	
CO2	4 EVR YOUNG	4 EVER YOUNG		250	400	150	
	Vty: KONFETTI	KONFETTI			100		
	Vty: NOVELTY	NOVELTY			100		
CO2	CHAR ROSE	CHARLOTTE ROSE		350	0	0	
CO2	KONFETTI ROSE	KONFETTI ROSE		100	0	0	
CO2	ROSE	ROSE		600	750	150	
	Vty: CLASSY	CLASSY			50		
	Vty: FREEDOM	FREEDOM			200		
	Vty: KON	WHITE WITH RED TIPS			100		
	Vty: LAGUNA	LAGUNA			150		
	Vty: LAVENDER	LAVENDER			100		
	Vty: MADAME	MADAME			100		
	Vty: NOVELTY	NOVELTY			50		
CO2	ROSE GARDEN STYLE	ROSE GARDEN STYLE		225	0	0	
CUT	AGAP	AGAP		520	25	0	
	Vty: LAVENDER	LAVENDER			25		
CUT	ALSTROE	Alstroe Red		20	20	0	
CUT	ANTHURIUM	ANTHURIUM		360	420	60	
	Vty: BLUE	BLUE			25		
CUT	CALLA LILY	CALLA LILY CUT		200	175	0	
	Vty: CAMEO	CAMEO			25		
	Vty: CHIANTI	CHIANTI			50		
	Vty: CYRSTL BLS	CRYSTAL BLUSH			50		

NOT TRACKING STEMS: If you are not tracking stems, you would leave off the Qty On Hand figures. The buyer can use this report for their COOLER COUNT. Once they know what is in the coolers, then they can determine what stem still need to be purchased. If you decide to track stems, ProTrac is designed for this purpose, as well

ProTrac's **Category** and ProTrac's **Color and Variety** work together to help your buyer:

- **Purchase the right stems**
- **Purchase the correct colors or varieties of those stems.**

This same report is available to help you and the buyer plan for the next Big Holiday.

This report was built by the buyer to match what they wanted to know about a Category.

The SR simply placed the Quote for the Wedding in the WEDDING Category and from there everyone knows what has to be done to fill orders for :

- **All Orders or Quotes**
- **All Orders or Quotes in the WEDDING Category**
- **Next Week's Standing Orders**
- **The Next Holiday**

Our Goal is to eliminate hand written orders and replace all of the **Yellow Sticky Notes, 18 " Legal Pads, or Hieroglyphics on a White Board,** and let everyone know what has been ordered and what needs to be ordered for the upcoming event.



Working With ProTrac's Holiday and Standing Orders

Categories give you a way to handle any kind of Special Event or Holiday.

A vendor gives you a special price for Lilies 2 months before Easter 2012

- You would key in a PO and assign it to an Easter 2012 Category
- You would then want to know how many lilies were purchased by each of your customers, last Easter.
 - You would run a Customer Purchases Report for each Customer or Customer Ship To that would show both the Stem and the Colors that each customer purchased. This letter report can be mailed, faxed, or Emailed to your customer.
- Your Sales Rep would have a copy of that report **when** they called the customers to offer them your **"Special Pre-Order Price for Lilies"**.
- All orders would be keyed as Quotes and assigned to the Easter 2012 Category
- At any time, you or your buyer can run a Order Requirement Report that includes both your initial PO and all quotes assigned to the Easter 2012 Category.
- As Easter 2012 nears, a keystroke will move all quotes to Sales Orders
- A keystroke will take all orders for Easter and print Pick Tickets with Stem, Color, and Variety
- Now Pick, Print Invoices, and Deliver the products.

ProTrac is an Enterprise Software Package that was designed for Microsoft Windows from the first day of development in 1991. We used a 4th Generation Relational Data Base to develop ProTrac.

Today we support the MS 2008 Operating System at 200 distribution sites in the US.

ProTrac supports a full range of data processing tools for

- **Fast Order Entry with color and variety**
- **AR, AP, GL, Bar Coding**
- **Inventory Control,**
- **Pricing updates and controls**
- **Qty Based Pricing by Customer**
- **Freight Cost by stem**
- **Standing Sales Orders**
- **Standing Purchase Orders**
- **Customer Relations Management**
- **Electronic Forms.**

**Now Colors and
Varieties -
Categories -
Order
Requirements**

Why ProTrac is being selected by Cut Flower Wholesalers

- ✦ **ProTrac “Is Cut Flowers”**
- ✦ **ProTrac was designed for Windows™**
- ✦ **No Additional Software Modules to purchase**
- ✦ **A Low Start up Cost and On Going Maintenance**
- ✦ **Software Updates are a part of the Maintenance Agreement**
- ✦ **Software Support with NO VOICE MAIL**

**Excellent Customer
References**

**Contact Mel Carney
For an Internet Demonstration
800-711-7374**