ProTrac Software from PDSI

ProTrac

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:

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

*Your *staff is trained with your converted data*

Support after install

o **800 support line**
o **Software updates**
o **After hours support**
o **Future Training Classes**
o **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

POS Part 1   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   ess: 7497 BRIAN CANYON

This is an order for a wedding that is scheduled for May 29.
The SR keyed the Quote on March 21. The quote was assigned to a Category called Wedding. A report can be run that shows you what commitments you have for Weddings in A Date Range

City: BUF   City: BUFFALO   ST: AR

Postal Cd: 987   Cd: 98765

Country: USA   ntry: 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
							0.00	288.00	N
							0.00	52.00	N
							0.00	101.25	N
							0.00	160.00	N
							0.00	105.00	N
							0.00	21.02	N

Variety Selection   var0002

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

> As soon as Sue keyed the 200 4 Ever Young Roses a drop down box with all of the colors connected with this stem, appears. These colors are put in by the wholesaler.
> Note the Qty Ordrd and Allocated are the same.


```
ARIZONA UNLIMITED, INC.                                    Order Date: 05/24/2011
1425 E. WASHINGTON ST.                                     Print Date: 05/24/2011
                                                           Print Time: 11:57 AM
PHOENIX, AZ  85034                                             Print#: 1
(602)271-0119                                                   Page: 1
                                                                PO#:
Special                                                     Order #: 5063
Instructions                                                Company: ARZ
-----------------------------------------------             Acct #: A1CAN01
Simpson and Thompson Wedding May 29,2011                     Terms: 2%10 NET30
                                                            Whse: TST
Sold To:                     Ship To:
 A 1 CANMAN FLORAL            A 1 CANMAN FLORAL
 7497 BRIAN CANYON           7497 BRIAN CANYON
 BUFFALO, AR 98765           BUFFALO, AR 98765
 USA                         USA
 Contact: TOM PAYNE
  Phone: (504)987-9755       Ship Via: Customer Pickup
 Picked:                     Time:

 Sls Rep: SUE                Sls ID: MDC

                                                    Bin        On    Qty   Picked  Order
Line P/L Item No        Description              Location   Hand To Pick    Qty     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 GROWR 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 AISLEAIRULA125   AISLE RUNNER FRENCH LACE 125' 73      1         _____      1
                                          (Continued On Next Page...)
```

> 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.

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


                                                   Qty           Cust Qty      Qty
P/L Item Number              Description         On Hand Qty On PO  Ordered  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 STNDARD             CARN STNDARD                      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
```

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

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