

2014

# Customer Purchases Letter from ProTrac

Holiday and Event history tracking

During our initial visit to a Cut Flower Wholesaler that we later installed, we realized that they had someone going through the stack of invoices and writing down what each customer had purchased Last Mother's Day or whatever holiday.

We developed a letter report that can be sent out to a florist as they are making their plans for **Mother's Day** this year.

**The letter can be run so that every flower manager for every store in a grocery chain will get their own letter.**

One of our customers uses this report in an unusual way: It is December 15<sup>th</sup> 2013 and they want to know how a customers buying stacks up with last year.

They run a report for Dec 1, 2012 through Dec 15, 2012  
They run the same report for 2013 and compare the sales numbers.

If they see that last year that the florist or church bought 100 poinsettias in this time frame, but not this year, they know that they need to call and find out what happened. It could be that the committee has changed and they do not know where they bought stems last year. Or they could be buying them from another source. **Either way they are called.**

Mel Carney  
Professional Data Systems, Inc.  
1/1/2014



## Cut Flower Purchases Letter

Retail Florists expect their Cut Flower Vendor to know what they have bought from them, Last Easter, Mother's Day, Or Valentine' Day.

ProTrac has a marketing letter Report that can be faxed, e mailed, or Mailed directly to the customer or to a store to let them know what they bought last holiday.

Each time it is sent the Cut Flower Wholesaler can create a different letter for the customer.

This is a page from a multi-page Customer Purchases report from ProTrac.

**Customer Purchases Letter**

Acct Number      From Acct: A1CAN01      From Inv Date: 04/27/0009  
 Category      To Acct: A1CAN01      To Inv Date: 05/09/2009  
 Customer SalesRep1  
 Order SalesRep1

P/L      From P/L: CO1  
 P/L-Item Number      To P/L: CO2

Letter Message:

Thank you for making ABC Cut Flower Wholesalers your choice for Cut Flowers. As a service to you and to give you a history of your purchases for Mother's Day 2010. Your purchases have been summarized by stem and by the color of each stem Use this guideline for your Mother's Day 2010 purchases. Your Sales Rep has a copy of this letter

Print one letter per:  Account Number     Ship Sequence

Process    Exit

Enter optional message to print in letter.

This is the report Set Up screen for the Customer Purchases Letter.

ARIZONA FLOWERS UNLIMITED, INC.  
1425 E. WASHINGTON ST.  
PHOENIX, AZ 85034

Phone: (602)271-0119      Fax: (602)271-1569  
April 23, 2010  
ANDERSON & FINCH FLORAL  
3729 W. BUCHANON ST.  
Phoenix, AZ 85033

Mother's Day 2010 is coming up and you want to send a note to your customers to let them know what they purchased last Mother's Day

Thank you for making ABC Cut Flower Wholesalers your choice for Cut Flowers. As a service to you and to give you a history of your purchases for Mother's Day 2009. Your Purchases have been summarized by stem and by the color of each stem. Use this as a guideline for your Mother's Day 2010 purchases. Your Sales Rep has a copy of this letter report

Previous Year's Purchases	This Year's Order
From: 04/27/2009	Shipment Dates
To: 05/09/2009	Date 1    Date 2

P/L Item Number	Description	Quantity
CO1 CARN FANCY	CARN FANCY	3150
Vty: PINK	PINK	1000
Vty: PURPLE	PURPLE CARNS	150
Vty: RED	RED	1250
Vty: TIPPED	WHITE RED TIPPED	600
Vty: VAR	VARIEGATED	150
CO2 ROSE	ROSE	950
Vty: CLASSY	CLASSY	125
Vty: DARK PINK		50
Vty: FREEDOM	FREEDOM	25
Vty: KON	WHITE WITH RED TIPS	250
Vty: KONFETTI	KONFETTI	250
Vty: LAGUNA	LAGUNA	250

Our customers tell us that their customers come in with this letter in their hand

The letter used for this report would be changed by you or your Sales Rep each time that it is sent out. The letter comes out so it can be stuffed in a #10 Window envelope and mailed. It can also be emailed or faxed to the customer.