

2014

WITH PROTRAC YOU CAN E-MAIL or PRINT an INVOICE

The invoice can be a plain paper
invoice or an ELECTRONIC FORM

Invoicing in today's environment requires
that we give our customers **OPTIONS**. The
OPTIONS with ProTrac Invoicing is that the
Invoice can be:

- **PRINTED AND MAILED**
- **E MAILED DIRECTLY FROM PROTRAC**
- **Printed and Emailed or Faxed**

The form that is used can be:

- **PLAIN PAPER**
- **ELECTRONIC**
- **A MULTI-PART FORM**

Once you go with electronic forms, there are
no more invoice forms to buy or store

800-711- 7374

Mel Carney
Professional Data Systems, Inc.
5/1/2014



WITH PROTRAC YOU CAN E- MAIL – FAX – or PRINT an INVOICE

Emailing or Faxing your invoice forms out of ProTrac just became automatic. When setting up the customer, you find out how they want to receive their invoices and tell ProTrac on this screen

The screenshot shows a software window titled "DEV-Customer Page1" with a menu bar containing "Customer Page1", "DEV", "ProTrac(R) 8.22.04", "197", and "cm0001". The main area is a form for customer data:

- Acct No: jim02, Name: Jim's Quality Supply
- Address: 664 SE Bayberry Lane, Suite 105, address line 3
- Phone: (816)554-3010, Ext: 1111111, SalesRep1: JIM
- Phone 2: () - , Ext: 2222222, SalesRep2:
- FAX: (816)554-3130
- Pstl Cd: 64063, Mobile: (444)444-4444
- City: LEES SUMMIT, State: MO, Pager: (555)555-5555, PIN:
- County: Jackson, E-Mail: melc@pdsi.com; jimh@pdsi.com
- Country: usa, Web Site: http://www.customerswot.com/swot.aspx#

Below the main form are two contact sections:

- Billing Contact:** Mary Canman (highlighted in green). Phone: () - , Ext:
- Order Contact:** Mike Hashman (highlighted in green). Phone: (888)888-8888, Ext: 8888888, FAX: (816)554-3130

Invoice preferences are shown in two blue-bordered boxes:

- Left Box:** Fax Stmt: Yes, Stmt Invoices: No, Grp Reprint Output: F, E-Mail: jimh@pdsi.com, Fax: (816)554-3130
- Right Box:** Print, E-mail jimh@pdsi.com, Fax

At the bottom, it shows "Last Prch Date: 04/22/2014" and "Last E". A red note states: "Note: Faxing requires Gold Fax".

A green-bordered box at the bottom contains the text: "When you set up a customer they will tell you how they want to receive their invoices - this is the screen that management sets up when you first set up a customer's file. This can be over ridden at the counter."

Footer text: "ESC=Exit F9=Order History" and "Enter data or press ESC to end."

The Customer has been set up for Emailing and Printing their Invoice. The printed copy can be sent with the driver for delivery and an original invoice can be e mailed directly out of ProTrac. **The next page has an order and a Picking Ticket.**

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PRO-POS Part 2

POS Part 2
PRO
ProTrac(R) 8.22.04
MDC
pos0009

Acct No: A1CAN01 Phone: (504)987-9755 Order No: 5747 Order Type: P

Name: A 1 CANMAN FLORAL Ship Name: A 1 CANMAN FLORAL

P/L	Item Number	Description	T	Qty	SellPrice /	CoreSell	Extended	T
LL	CALLA LILY	CALLA LILY	S	100	8.27	0.00	827.00	N
RS	4 EVER YOUNG	4 EVER YOUNG	S	300	1.67	0.00	501.00	N
RS	ROSE	ROSE	S	100	0.86	0.00	86.00	N
CUT	LATHYRUS PREM WHT	Lathyrus Premium White / aai01	S	50	1.10	0.00	55.00	N
WED	AISLEAIRULA125	AISLE RUNNER FRENCH LACE	S	1	21.02	0.00	21.02	N
			S	1	0.00	0.00	0.00	N

This is an order for stems, from here a Pick Ticket can be printed for the cooler. Once picked an Electronic Invoice can be created and sent via Email or Fax directly from ProTrac. The invoice form can also be printed and given to a driver.

Faxing will require GoldFax software.

Line: 6 Of: 6
Sub Tot: 1,490.02
Tax: 0.00
Total: 1,490.02

Desc:
Wght: 0.00

List: 0.00
Notes:

CM%: 45.29

TAB/BACK-TAB=Navigate, F8=Item Browse, F12=Catalog, ?=Options

Enter P/L or '***', enter comments. Enter=Process,F2/Esc=Cancel

P I C K I N G S L I P									
ARIZONA UNLIMITED, INC. 1425 E. WASHINGTON ST. PHOENIX, AZ 85034 (602)271-0119					Order Date: 05/12/2014 Print Date: 05/12/2014 Print Time: 10:55 AM Print#: 1 Page: 1 PO#: _____ Order #: 5747 Company: ARZ Acct #: A1CAN01 Terms: 2%10 NET30				
Special Instructions									
Sold To: A 1 CANMAN FLORAL 7497 BRIAN CANYON BUFFALO, AR 98765 USA Contact: TOM PAYNE Phone: (504)987-9755 Picked: _____ Sls Rep: JJ					Ship To: A 1 CANMAN FLORAL 7497 BRIAN CANYON BUFFALO, AR 98765 USA Ship Via: Customer Pickup Time: _____ Sls ID: MDC				
Line	P/L	Item No	Description	Bin Location	On Hand	Qty To Pick	Picked Qty	Order Qty	
4	CUT	LATHYRUS PREM WHT	Lathyrus Premium White / aai01		0	50	_____	50	
		BABY PINK	BABY PINK			25	_____		
		BLUE	BLUE			25	_____		
1	LL	CALLA LILY	CALLA LILY		0	100	_____	100	
		RUST	RUST			50	_____		
		WHITE	WHITE			50	_____		
2	RS	4 EVER YOUNG	4 EVER YOUNG		0	300	_____	300	
		NOVELTY	NOVELTY			100	_____		
		PEACH	PEACH			100	_____		
		WHITE	WHITE			100	_____		
5	WED	AISLEAIRULA125	AISLE RUNNER FRENCH LACE 125'		69	1	_____	1	
3	RS	ROSE	ROSE	CL	0	100	_____	100	
		NOVELTY	NOVELTY			100	_____		
Totals:						Pick	Qty	Qty	
						-----	-----	-----	
						551		551	
					Picked By: _____				

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When the pick ticket is completed it is given to an accounting person to review and to create an invoice.

With ProTrac you can print a original invoice for delivery and send a E Mail directly to the florist. This can be done at the same time. If you wait and email later, the invoice will indicate that this is a REPRINT of the Original Invoice.

Screens used to Finalize and send the Invoice

The screenshot shows the 'Sales Transaction' window with the following details:

- Invoice Date: 05/12/2014
- Order No: 5747
- Password: [blank]
- Sub Total: 1,490.02
- Misc. Charge: 0.00
- Discount: 0.00
- Taxable Total: 0.00
- Tax: 0.00
- Freight: 0.00
- Fuel Surcharge: 0.00
- Total Due: 1,490.02
- Tender: CH
- Charge Amt: 0.00
- Cash Amt: 0.00

At the bottom, there are buttons for '<--Back', 'Ensh Ltr', 'Print', and 'Fax'. A text box at the bottom reads: 'Enter amount of misc charge or 'P' to enter a %.'

A green-bordered callout box contains the text: 'This the Invoice wrap up form. The system will take a Charge, Cash, Check, or CC. The customer is charging this invoice.'

The screenshot shows the 'Output Options' dialog box with the following settings:

- Available Printers: BWN_SRVKonica IP-421 PCL
- Print: (circled in red)
- E-Mail: (circled in red)
- Fax: (circled in red)
- To E-Mail: eda@addisonalec.com (with an arrow pointing to the field)
- From E-Mail: melc@pdsi.com
- From Name: ARIZONA UNLIMITED, INC.
- Subject: information from ARIZONA UNLIMITED, INC.

Buttons for 'Ok' and 'Cancel' are at the bottom.

With the new ProTrac Program both the Print and the E Mail would be done at the same time, as that is the instructions in the Customer record

When you tell ProTrac to print – ProTrac will already know that you want to Print and Email or Fax the invoice to the customer. You would set that up in the customer's profile screen, Page 2 of this document. The invoice on the next page will be Printed and or E mailed/ Faxed as a PDF and with your logo, it will look very sharp. Mel Carney



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 www.pdsi.com

Invoice

Invoice Date	Invoice No
05/12/2014	2951
Time	Order No
12:11 PM	5747
Acct No	Page
A1CAN01	1

Sold To		Ship To	
A 1 CANMAN FLORAL 7497 BRIAN CANYON BUFFALO, AR 98765 USA		A 1 CANMAN FLORAL 7497 BRIAN CANYON BUFFALO, AR 98765 USA	

Contact	Phone	Terms Code	Customer P.O.	SlsID
TOM PAYNE	(504)987-9755	2%10 NET30	9685	MDC

Special Instructions	Ship Via	Tax Exempt No	SlsRep
	Customer Pickup	RETAIL	JJ

P/L	Item Number	Description	Quantity Ordered	Quantity B/O	Quantity Shipped	Sell Price	Ext Price	T
LL	CALLA LILY	CALLA LILY	100	0	100	8.27	827.00	N
	Vty: RUST	RUST	50					
	Vty: WHITE	WHITE	50					
RS	4 EVER YOUNG	4 EVER YOUNG	300	0	300	1.67	501.00	N
	Vty: NOVELTY	NOVELTY	100					
	Vty: PEACH	PEACH	100					
RS	ROSE	ROSE	100	0	100	0.86	86.00	N
	Vty: WHITE	WHITE	100					
	Vty: NOVELTY	NOVELTY	100					
CUT	LATHYRUS PREM WHT	Lathyrus Premium White / aa01	50	0	50	1.10	55.00	N
	Vty: BABY PINK	BABY PINK	25					
	Vty: BLUE	BLUE	25					
WED	AISLEAIRULA125	ISLE RUNNER FRENCH LACE 125'	1	0	1	21.02	21.02	N

**THANK YOU FOR YOUR PURCHASE
 OUR NEW HOURS ARE 7:00AM TO 5:30PM**

Non-Tax Total	1490.02	Sub Total:	1490.02
Taxable Total	0.00	Misc Charges:	0.00
		Discount:	0.00
		Tax:	0.00
		Freight:	0.00
		Invoice Total:	1490.02

X _____
 Received By
 Thank You

Most Cut Flower Wholesalers send the invoice with the driver. Now you can send the invoice with the driver and E MAIL a copy of the invoice to the company. This is to ensure that the invoice is received so it can be paid.

We are also adding the ability to E Mail Print or Fax Statements
 Give us a call and we will send out a quote for you that will include all of the new features that we have added to our Electronic Forms Package.

Mel Carney