2015

ProTrac Inventory Requirement Report

An Analytical Tool for the Hard Goods Wholesaler

Staying on top of every one of your projects currently requires endless reviews of Excel documents. Those documents have to be done and redone for every job / project.

ProTrac gives our customer a software program to give them a better way to stay up with their inventory obligations to customers

We listened to our customers and rethought the way that a distributor looked at their

- Day to day orders
- Quotes for a project
- Managing their inventory to ensure that the a customer's project was covered with on hand or inventory coming in on a Purchase Order

With our Order Requirement Report a wholesaler can watch:

- 1. Their day to day orders
- 2. Special Projects, like new customer openings. (Inventory must be at a customer's site on a specific day.)

Mel Carney Professional Data Systems Inc 2015 **Our customers needed more than just FORECASTING**. They needed an Up to The Minute ANALYTICAL TOOL to stay on top of their inventory and inventory commitments.

They wanted to review:

- All Open Orders
- Open Quotes
- Standing Quotes
- Planned Purchase Orders
- Submitted Purchase Orders
- Quantity On-Hand
- All Customer
 Projects

We created our Order Requirements Report to let our customers see all of their inventory obligations using their own industry knowledge and the power of our powerful 4 GL Relational Data Base.

One of our customers called the Report a Giant **What If Report**?

The wholesaler can review all open orders, Quotes, Submitted and Planned Purchase Orders.

They can review all Open Orders and Quotes by a Category. (Job, Standing Order, Standing Quote, etc.)

ALL ON ONE REPORT	

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Benton is opening a new Marquis Rest in Phoenix It will be opening August 1st	 By Sales Rep1 Kits Include Non Real Items By Sales Rep2 Display Line Notes By Sales ID By Acct No This report can report on
PO Selection: All Open POs By Date Entered By Date Required By Date Required	submitted and / or planned PO's ✓ Category □ Display Purchase Order Detail □ Include Planned POs
All Inventory P/L Range No Excel documents are required for any of this information Proce Enter category or ? to browse.	Include current on hand to calculate requirement In May, knowing what you have in stock for an August Order would be useless information - so you can eliminate the on hand column on the report ss Exit

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For this example we are going to start from the beginning when the Sales Rep creates a Quote for a new opportunity.

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ALL-CLAD KITCHEN TOOL SET

Ice Cream Dipping Cabinet

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RSP ALLTSET1

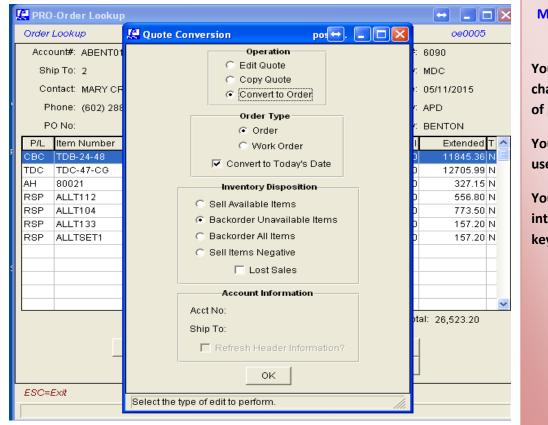
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INVENTORY REQUIREMENT REPORT

This report came as a result of asking ProTrac for all quotes for the Category called **Benton**, which is for the new Benton Marquis Restaurant.

The customer accepted the quote and the next step will turn it into a Sales Order.

The next screen shows how easy this is with ProTrac.



MOVING A QUOTE INTO A SALES ORDER

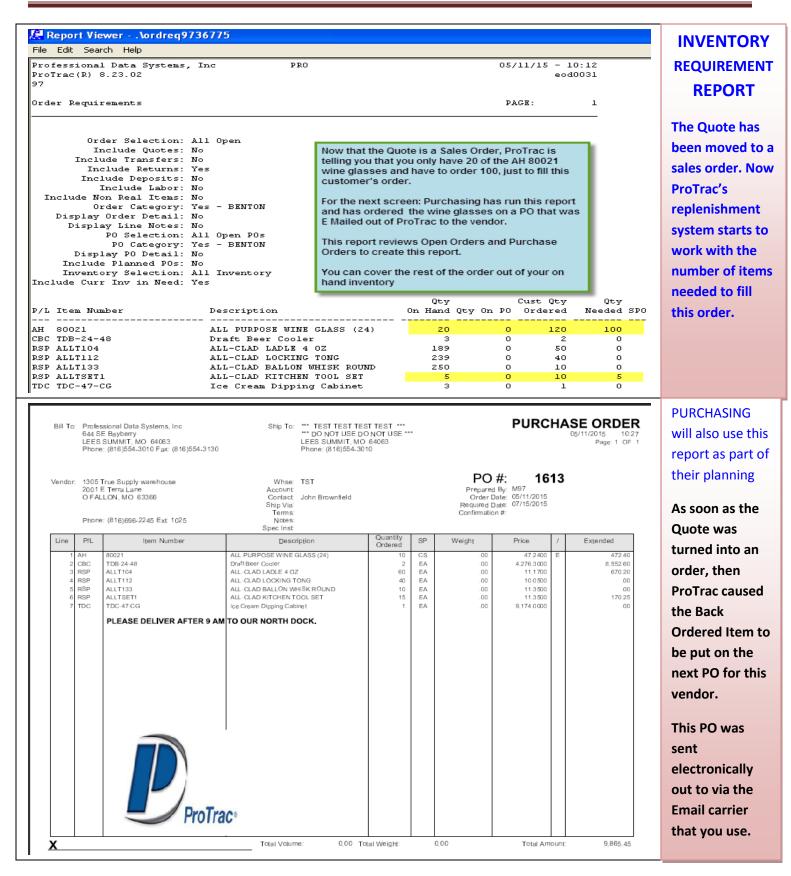
You can edit a quote and change items and amount of products.

You can copy a quote and use it for another customer

You can convert a quote into a sales order with a keystroke.

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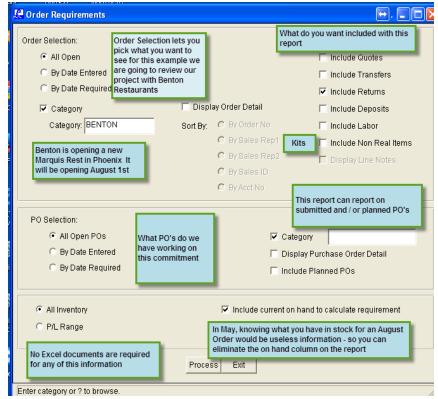
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There are a lot of options when it comes to using the Order Requirement Report. If you want to look at where you stand on all open orders you can display them without a CATEGORY.

ProTrac will show you every item that has been ordered. It also has a report that shows you by item every customer who has this item on order at this time.

To run that report you would click the **Display Order Detail** and ProTrac will print out each item and the customers who purchased this item.

If you need items that are on a PO that you are building but have not submitted yet you would ask ProTrac to look at all Planned PO's

If you are working with a project that is not due for 3 months, you can eliminate the column showing on hand. For a September job, knowing what is on order in May has no impact.

Come the first of August that will become valuable information.

ProTrac's Inventory Requirement report gives you the largest WHAT IF report possible. The report does not update anything, it just reports the information on a day's orders, a large project, and what you owe to a customer's project.

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ProTrac's Inventory Requirement Report is forging new ground in the world of inventory report writing. In all other reports and programs we use Linear Thinking to create the standard reports.

What our customers wanted was the flexibility to make a buying decision that did not always follow Linear Thinking, they wanted to be able to:

- Simply look at all Open Orders and Open PO's for a Product Line and see how they stand with those products
- Or to run the same report to review all inventory commitments whether on an Order, Quote, Committed Purchase Order, or CATEGORY.

The Order Requirement report gives our customer the flexibility to make buying decision based on – Up to the minute

REAL TIME INFORMATION

Linear Thinking is a Process of thought, which follows a known cycle or step-bystep progression.

Accounting and Inventory reports demand a step by step though the process. Each step in the report must be taken and completed before the next step is taken.

In a "What IF" report, the logic is changed to let the user decide what information they need and how they want their information presented.

NO EXCEL Documents that have to be redone time and time again.

Mel Carney 800-711-7374