

2014

This document can be sent to your customers as a training aid so that they can enter orders directly into ProTrac from their desktop or Laptop. We can tailor this document to include your LOGO and Company name.

# Your Tool and Supply, Company - On Line Order Entry for your Customers

**Its 5 AM and you are a contractor getting ready to go to the job that is 3 hours away.**

You need product from **Your Tool and Supply, Inc.** and you need it delivered today. Instead of calling from your cell phone while driving 70 miles an hour at 7 AM, you can submit that order from your Laptop or home computer. All you need is the ProLinc Icon and the internet.

**As soon as you submit the order:**

Their new software, **ProTrac**, will receive the order and immediately print a pick ticket and update inventory at their warehouse.

**At Your Tool and Supply, Inc:**

Your order will have been picked and shipped or if you are picking it up it will be ready and waiting for you, when you walk in the door.

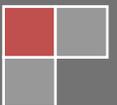
With ProTrac, you will see **your pricing and their inventory availability in Real Time, when you book the order.**

You will have all of the search capabilities that the staff of **YOUR TOOL Supplier** when entering your order

**Call Mel for a demonstration of this new software**

**1-800-711-7374**

Mel Carney  
Your Tool and Supply Company  
1/1/2014



## ProTrac ProLinc Software for Customer Remote Ordering

At **Your Tool and Supply, Inc.** we have worked with our software supplier **Professional Data Systems**, and our customers can now order on line from their PC.

### You will be able to:

- Search our entire Inventory Data Base for an inventory item
  - Review
    - How many units are available for sale
    - What your price is for an item
    - Place an order for an item or items
    - Past Orders
- Order from **YOUR LIST OF FAVORITE ITEMS**
- Order everything on the list with a key stroke or order 1 or 2 items from each of your favorite lists.

### Added Features:

You can review all of your **OPEN** and **CLOSED ORDERS**

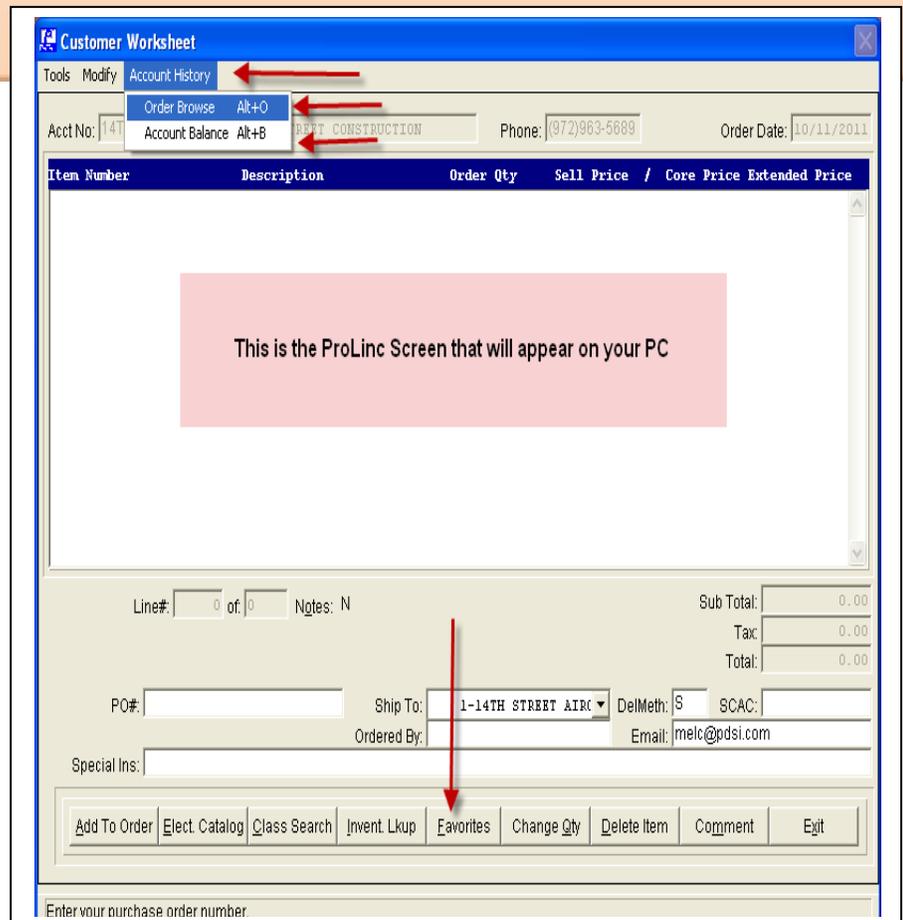
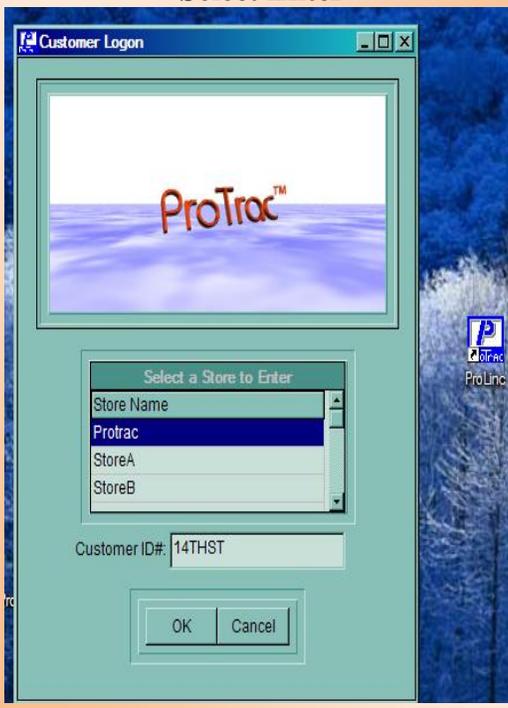
Review your **Accounts Receivable** including doing an aging on your account by invoice or due date.



The ProLinc process starts very simply. We will send you an ICON like the one on the left.

You would put the shortcut onto your computer screen and when you wanted to order, Select the ICON and the ProLinc Log On Screen will appear on the screen.

This is the ProLinc Log On Screen  
Simply key in your Password and  
Select Enter



## ProTrac ProLinc Software for Customer Remote Ordering

### Display your ACCOUNT HISTORY – Open Orders - Closed Orders - Accounts Receivable

You have logged onto ProLinc and want to review your Sales Order **4290**.

ProLinc displays all of the Open Orders for you.

Select the Order you want and hit Enter.

Whether on an order or looking up a price, you will always see you're pricing for each item.

You have selected your Order Number **4290** and ProTrac displays all of the lines on that order

**Order Browse**

ProTrac(R) 8.21.01      cust1010

For this example the Account History was selected and from that drop down the customer can select Order Browse which is what is being done on this screen

Display  
 Status: All Orders  
 Sort By: Order Number  
 Selected Fields: [v]  
 Maximum: 500 Records

The customer wants to see their Order #4290. They would hi lite that order and select the left button on the mouse

Order #	Account#	ShipTo Name	Order Date	OrderTotal
4297	14THST01	14TH STREET AIRCRAFT	03/11/2009	68.14
4291	14THST01	14TH STREET AIRCRAFT	03/06/2009	1,081.11
4290	14THST01	14TH STREET AIRCRAFT	01/30/2009	1,038.51
4279	14THST01	14TH STREET AIRCRAFT	01/22/2009	11.27
4273	14THST01	14TH STREET AIRCRAFT	01/22/2009	798.00
4255	14THST01	14TH STREET AIRCRAFT	01/08/2009	398.25
4254	14THST01	14TH STREET AIRCRAFT	01/08/2009	1,070.31

Line#: 3 of 7

Refresh   F5/Srch   Tracking#   Exit

ESC=Exit  
 Designate which display field to sort and search by

**Order Detail**

ProTrac(R) 8.21.01      cust1012

Account#: 14THST01    14TH STREET AIRCRAFT      Order#: 4290

Ship To: L            14TH STREET AIRCRAFT      Taken By: Adm

Contact: JOHN MILLARD      Order Date: 01/30/2009

Phone: (972)963-5689      Order Status: Picking

P/L	Item Number	Description	SellPrice	CoreSell	Qty	Extended	Tax
1.0	12-3050	3" X 50 YDS 50 GRIT SANDER ROL	57.24	0.00	10	572.40	No
1.0	522101	ALUM OX 3/4" 24G 2PLY	0.76	0.00	10	7.60	No
1.0	704023	HANDY ROLL 1" 100J G	43.27	0.00	10	432.70	No
CAE	05864E	2-7/16" 135 DEGREE SPILT POINT	7.95	0.00	1	7.95	No
CAE	0586862E	2-1/8" 135 DEG SPLIT POINT	7.68	0.00	2	15.36	No

This is the customer's Open Order with all items and their prices. The customer can only look they cannot make any changes.

Sub-Total: 1,036.01    Tax: 0.00    Total: 1,038.51

Next   Prev   Exit

ESC=Exit  
 Press 'Enter' to view detail information.

## ProTrac ProLinc Software for Customer Remote Ordering

**A/R Browse** ProTrac(R) 8.21.01 cust1013

Account #: 14THST01 14TH STREET AIRCRAFT Credit Limit: 60,000.00  
 Past Due: 4,133.59  
 Current Balance: 4,133.59

**From the Account History drop down the AR Browse was selected. An open or invoiced order can be displayed with detail for the customer - they can run an aging**

Trans	Invoice #	Trans Date	Order #	Due Date	Description	Invoice Amt	DB/CR	Open
Invoice	2319	01/30/2009	4282	03/01/2009	INV 2319	188.54	DB	Yes
Invoice	2318	01/30/2009	4170	03/01/2009	INV 2318	1,326.30	DB	Yes
Invoice	2317	01/23/2009	4245	02/22/2009	INV 2317	990.71	DB	Yes
Invoice	2315	01/22/2009	4277	02/21/2009	INV 2315	223.15	DB	Yes
Invoice	2314	01/22/2009	4269	02/21/2009	INV 2314	21.56	DB	Yes
Invoice	2310	01/20/2009	4247	02/19/2009	INV 2310	990.71	DB	Yes
Payment	2310	01/22/2009	4247		CK# 8985	344.10	CR	Yes
Payment	2289	01/12/2009	4173		CK# 1234	100.00	CR	Yes
Payment	2289	01/12/2009	4173		CK# 654	50.00	CR	Yes
Payment	2289	09/18/2008	4173		CK# 8794	191.90	CR	Yes
Invoice	2289	09/17/2008	4173	10/17/2008	INV 2289	1,078.62	DB	Yes
Invoice	2313	01/21/2009	4248	02/20/2009	INV 2313	62.83	DB	No
Payment	2313	01/22/2009	4248		CK# 8985	62.83	CR	No
Payment	2308	01/22/2009	4262		CK# 8985	47.94	CR	No
Invoice	2308	01/19/2009	4262	02/18/2009	INV 2308	47.94	DB	No

Search Aged Totals Order Detail Exit

ESC=Exit

Enter data or press ESC to end.

After looking at a specific Invoice, you can then browse your Accounts Receivable

Note the far right column that shows whether an invoice is open or paid.

ProTrac displays all checks and Invoices you have given to us on your account.

With ProTrac's ProLinc you can see.

- Your Order history
- Open and Closed Orders
- An Aging of your account

**Aging Balance**

Acct No: 14THST01 14TH STREET AIRCRAFT Last Prch Date: 01/30/2009

Trans	Invoice #	Trans Date	Order #	Due Date	Days Past	Invoice Balance	Open
Invoice	2289	09/17/2008	4173	10/17/2008	147	736.72	Yes
Invoice	2310	01/20/2009	4247	02/19/2009	22	646.61	Yes
Invoice	2314	01/22/2009	4269	02/21/2009	20	21.56	Yes
Invoice	2315	01/22/2009	4277	02/21/2009	20	223.15	Yes
Invoice	2317	01/23/2009	4245	02/22/2009	19	990.71	Yes
Invoice	2318	01/30/2009	4170	03/01/2009	12	1,326.30	Yes
Invoice	2319	01/30/2009	4282	03/01/2009	12	188.54	Yes

**The customer asked for an aging of their account which can be done by due date or Invoice date**

Current	Over 30	Over 60	Over 90	Over 120
3,396.87	0.00	0.00	0.00	736.72
				UA Payments
Age By: <input checked="" type="radio"/> Due Date <input type="radio"/> Invoice Date				0.00

Done

Enter data or press ESC to end.

At Your Tool and Supply your phone call or visit is always welcome.

Use this service when it is convenient for you

## ProTrac ProLinc Software for Customer Remote Ordering

**ProLinc and Favorites:** ProLinc has a list of favorite products that you normally order. your sales rep at Gulf Sales and Supplies can set up these **Favorite Lists Up** or you can add or change your own list of favorites.

How would I use this Favorites List to order Product from **Your Tool and Supply, Inc.?**

**You have won a bid and you will need a product for that job**

- Name the ProLinc Favorite List, that Job Number or Name
- Build a list of the products needed - directly from our company's inventory Data Base
- Tell ProLinc the number of each unit, that you normally buy

**Then At 4 AM as you are headed for that job, 2 hours away**

- Log into ProLinc, there will be your entire list of products for that job and how many you want to buy. Without remembering the item or screw number or length, you can have your order entered in a few minutes and get on the road.

For this example, 14<sup>th</sup> ST Construction has two favorite lists. The first is for Abrasives and the second is for Drill bits. The customer can display all of their lists and select the one that they want. They can order every product on a list with one keystroke or they can order one or more items from multiple lists.

At the bottom of the customer order pad is key called "Favorites": The customer can have as many favorite orders as they want. This customer has two favorite orders and both are displayed below

Special Ins: Each order can have special instructions from the customer

Add To Order | Elect. Catalog | Class Search | Invent. Lkup | Favorites | Change Qty | Delete Item | Comment | Exit

**-Favorites** ProTrac(R) 8.22.03 fav0001

Favorite List: Abrasives  
Desc: Abrasives for 14th St Aviation

P/L	Item Number	Description	List Qty
1.0	12-3050	3" X 50 YDS 50 GRIT SANDER ROL	10
1.0	522101	ALUM OX 3/4" 24G 2PLY	10
1.0	704023	HANDY ROLL 1" 100J G	10
CAE	05864E	2-7/16" 135 DEGREE SPLT POINT	1
CAE	0586862E	2-1/8" 135 DEG SPLT POINT	2

For this 14th Street Construction Company they have two Favorites One for Abrasives and one for Drill Bits - They can order all 5 of these items with one key stroke or order 2 of the 3 items on the screen

Create Add Itm Edit Delete DeleteAll Order Order All Exit

ESC=Exit

Enter data or press ESC to end.

**-Favorites** ProTrac(R) 8.22.03 fav0001

Favorite List: Drill Bits  
Desc: Order Pad for Drill Bits

P/L	Item Number	Description	List Qty
CAE	0586862E	2-1/8" 135 DEG SPLT POINT	10
CAE	05900D	2-5/8" 135 DEG SPLT PT ARCFT E	10
HAH	53100	Drill Bit Regular-Point High-S	20
HAH	53101	Drill Bit Regular-Point High-S	15
KLE	53116	Drill Bit Regular-Point High-S	30

This Favorite for 14th Street has 5 different types of Drill bits that they Order. This list can have 30 or 40 items if they want.

Create Add Itm Edit Delete DeleteAll Order Order All Exit

ESC=Exit

Enter data or press ESC to end.

## ProTrac ProLine Software for Customer Remote Ordering

**You decide to order all of items on the Abrasive Favorite List.  
This was done with one key stroke**

**Customer Worksheet**  
Tools   Modify   Account History

Acct No: 14THST01   Name: 14TH STREET AIRCRAFT   Phone: (972)963-5689   Order Date: 03/13/2009

Item Number	Description	Order Qty	Sell Price /	Core Price	Extended Price
12-3050	3" X 50 YDS 50 GRIT SANDER R	10	57.24	0.00	572.40
** Comment - This is a comment on the above Item					
522101	ALUM OX 3/4" 24G 2PLY	10	0.76	0.00	7.60
704023	HANDY ROLL 1" 100J G	10	43.27	0.00	432.70
** Comment - This is a comment on the Handy Roll product					
05864E	2-7/16" 135 DEGREE SPLIT POI	1	7.95	0.00	7.95
0586862E	2-1/8" 135 DEG SPLIT POINT	2	7.68	0.00	15.36

**The customer can add more items to this order, change the number ordered, or delete a line altogether. If the customer is done with this order they can key in special instructions, select Exit and ProTrac will send a pick ticket to your printer, update the inventory availability and log the customer off of ProLine**

Line#: 5 of 7   Notes: N

Sub Total: 1,036.01  
Tax: 0.00  
Total: 1,036.01

PO#:   Ship To: 1-14TH STREET AIRC   DelMeth: S   SCAC:   Contract ID No.:   Ordered By:   Email: melc@pdsi.com

Special Ins: **Deliver to the back dock before noon**

Add To Order   Elect. Catalog   Class Search   Invent. Lkup   Favorites   Change Qty   Delete Item   Comment   Exit

Type in your comment for this line item

**Class Search**   ProTrac(R) 8.21.01   posb002

P/L: MLT   0430-1   Stocked: No

Description: 1/2" CORDLESS DRILL

Full Description

Class:   P/L:   SubClass:   Year:   Description: drill cordless

Search Results						
P/L	Item Number	Description	ClassCode	Sub Class	Available	Your Price
MLT	0430-1	1/2" CORDLESS DRILL	ETOO	DRILL	6	264.10
MLT	202-20	V 1200 magnum 3/8" Cordless	ETOO	DRILL	41	142.50
MLT	31100-20	1/4" CORDLESS DRILL	ETOO	DRILL	29	275.50
MLT	44406-1	SC: MLT0244-1 CORDLESS DRILL	ETOO	DRILL	1	318.40

**The customer has all of the search capabilities that your people have when it comes to finding product in your inventory. For this example the customer wanted a cordless drill. As long as the word is in the 180 character description, ProTrac will find it. You can also use a wild card search with the use of an Asterisk after a series of letters.**

F5/Srch   Add To Order   Exit

**ProLinc and Completion of the Order by the Customer**

At the conclusion of your order you only need to select Exit to finish the order. You can also put a comment at the end of an order or under any line on the order. You will be able to key in a comment on any line or at the bottom of the Order.

When you Exit you are given the choice of submitting the order, canceling the order, or adding more product.

If you accept the order as it stands, you will be automatically logged off of ProLinc. At our office a special printer has been set up for **ProLinc Pick Tickets**. That printer will immediately start to print your Pick ticket.

Once the pick ticket is printed the order will be part of your normal order process.

**We encourage you to come by and see this process for yourself**

**Availability of product:** When ProLinc says that there are 10 units available, that is what is available for sale at Your Tool and Supply Company. The inventory you are seeing is in REAL TIME. As soon as you submit your order, the inventory on your order is removed from availability.

**GIVE US A CALL AND SCHEDULE A DEMONSTRATION OF PROLINC**

Mel and his entire staff at **Your Tool and Supply, Inc.** can talk to you about this new service – We have it loaded on the system at the store and on our Laptop. Ask for a demonstration. We can also bring ProLinc to your location for a demonstration. **Your Tool and Supply, Inc.** is working to be you're only Tool and Accessory Supplier.

**(800) 711-7374**