

PocketAdvantage™

Product Overview

Used by Over **10,000** Sales Reps Every Day

PocketAdvantage™

- Software designed for distributors
 - Easy to Use
 - Color Coded
 - Limited number of screens to navigate
 - Works on any Windows based PC or Handheld
 - Integrates with Accounting system
 - Increased Efficiency
 - More time to sell
 - Accurate Orders
 - Reduces need for sales support
 - Up to date inventory
 - No manual entry

Distributor Sales Force Automation

- Demonstration
 - Select a Customer
 - Select and Order Products
 - Recap Order for Accuracy
 - Send Order and Confirm Receipt

Home Screen

Show Customers

The screenshot shows a software interface for 'Inventiv Wine Co.' with a menu bar (File, Options, View) and a toolbar containing 'M', 'D', 'H', 'R', '\$', and 'Show Customers'. The main area displays 'No Pending Records' and a table with the following columns: Customer Name, CustID, Cases, Units, Entries, Ext Price, Hold, and Ordered. The table is currently empty. At the bottom, a summary bar shows 'Pending Orders Total: 0 Cases 0 Units 0 Entries' and 'Unsent Orders Shown'.

Customer Name	CustID	Cases	Units	Entries	Ext Price	Hold	Ordered
No Pending Records							
Pending Orders Total: 0 Cases 0 Units 0 Entries							
Unsent Orders Shown							

Color coded screens make navigation and support easier

Customer List

PA Inventiv Wine Co. _ □ ×

Options View

← Home R \$ < Find Customer Name >

Customer Name ▲	CustID	Street	City	Phone	Curr bal	Overdue
Bobo Grill	1962	565 Erin Rd	Bowie	301-763-3677	1,004.49	0.00
Bon-Ton Cafe	1415	151 Monroe	Memphis	901-525-0883	341.52	341.52
Bowie Foundation	2002	750 Cherry Street	Bowie	301-685-1566	0.00	0.00
Bowie Hunt & Polo	2014	650 Shady Gr Rd	Bowie	301-685-8296	0.00	0.00
Bowie Oaks Golf Club	2015	4143 East Holmes Street	Bowie	301-363-4744	0.00	0.00
Brooklyn Restaurant	1194	1779 B W Street	Bowie	301-755-7413	357.82	0.00
Brunswick	1206	3703 North Chuckles	Bowie	301-362-1620	0.00	0.00
Buck's_ 2240	2240	22 So. Upton	Bowie	301-722-8744	0.00	0.00
Buckaneer	1205	1368 Monroe Ave	Memphis	901-278-0909	0.00	0.00
Butcher,Baker,Candlemaker	2602	Family Restaurant	Munford	901-837-1661	0.00	0.00
Cafe Du Bois	1238	959 So. Upton	Bowie	301-274-1504	185.32	0.00

Select Customer

Payment Status

Order Products

PA Inventiv Wine Co.

Options View

< Find ItemID > ALL Products

Inv1 Shelf Brunswick, 0 Cases, 0 Units, 0 Er Regular order

Description	It... Δ	Case Price	Unit Price	In Stock	On Order
Old Charter Ten Travler 750ml/12	11105	162.12	20.71	101.58	0.00
Old Charter Ten 375ml/24	11106	148.92	13.40	90.96	0.00
Old Charter Ten 200ml/48	11107	169.35	10.73	42.90	0.00
Old Charter Ten 12pk 50ml/120	11108	102.00	8.05	20.40	0.00
Charter 8 Buster Barrel 750ml/12	11110	130.50	18.08	14.00	0.00
Old Charter Eight 1.75l/6	11112	134.11	29.55	577.83	0.00
Old Charter Eight 1 ltr/12	11113	175.74	21.85	123.00	0.00
Old Charter Eight 750ml/12	11114	139.50	18.83	284.25	0.00
Old Charter Eight Travlr 750ml/12	11115	139.31	18.81	180.08	0.00
Old Charter Eight 375ml/24	11116	130.29	12.63	92.75	0.00

↑
Select Product

↑
Item ID

↑
Pricing

↑
Current Inventory

Order Quantities

PA Inventiv Wine Co.

Options View

← Home R \$ C ol ALL Products

i Inv1 Shelf Brunswick, 0 Cases, 0 Units, 0 Entries, 0.0

Description	ItemID	Case Price	Unit Price	In Stock
Ogier Syrah*Rosine* 750ml/12	43664	204.00	24.20	0.0
Old Charter 8 12pk 50ml/120	11118	87.03	7.93	0.0
Old Charter Bond 750ml/12	11064	138.20	18.72	1.5
Old Charter Eight 1 ltr/12	11113	175.74	21.85	123.0
Old Charter Eight 1.75l/6	11112	134.11	29.55	577.8
Old Charter Eight 200ml/48	11117	144.88	10.22	53.9
Old Charter Eight 375ml/24	11116	130.29	12.63	92.7
Old Charter Eight 750ml/12	11114	139.50	18.83	284.2
Old Charter Eight On-Pck 750ml/12	11119	130.50	18.08	0.0
Old Charter Eight Travlr 750ml/12	11115	139.31	18.81	180.0

Regular order for Product 11113

Old Charter Eight 1 ltr/12

c i P Inv1 Book It Cancel

1 2 3 125 Cases\Units*

4 5 6

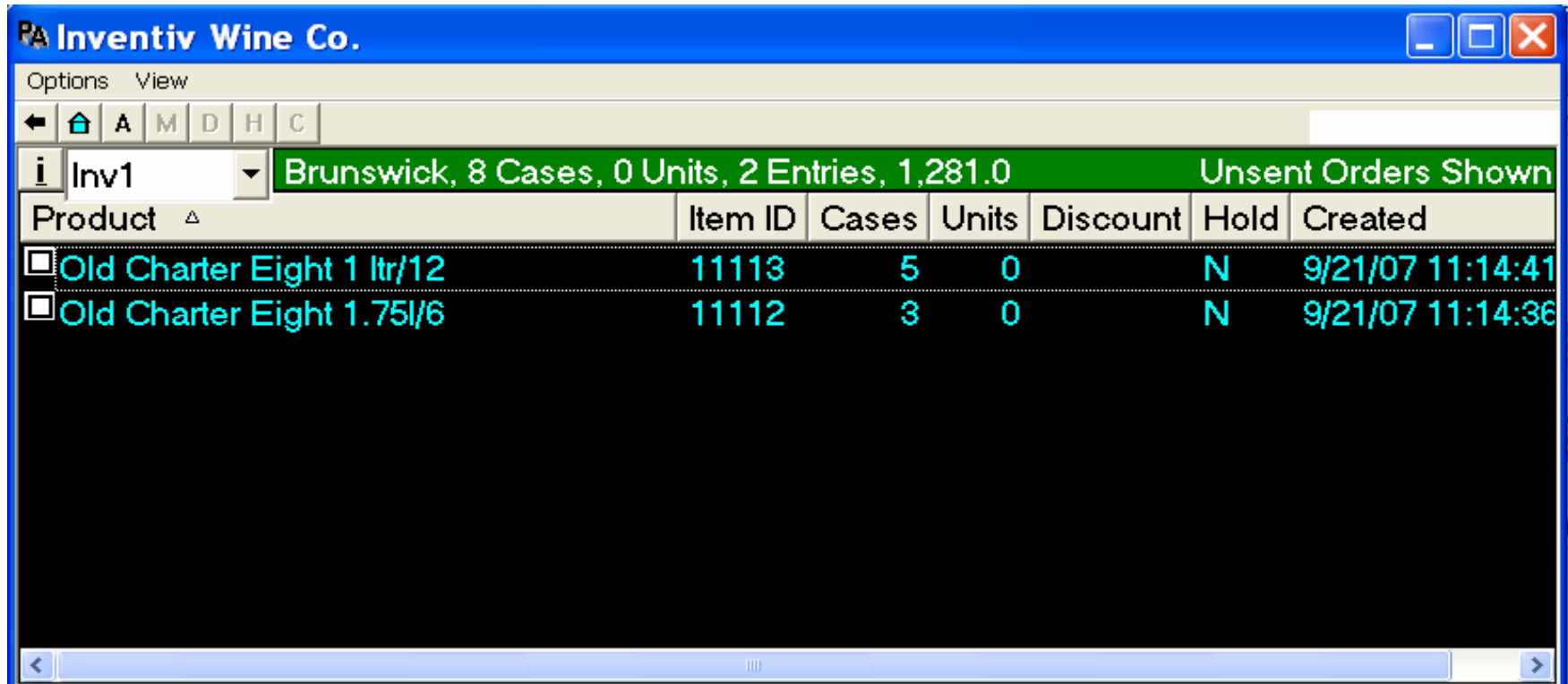
7 8 9

0 . Shelf

Clear

Insert Quantity and Book It

Review Orders



The screenshot shows a software window titled "Inventiv Wine Co." with a menu bar containing "Options" and "View". Below the menu bar is a navigation bar with icons for home, back, and several function keys (A, M, D, H, C). The main display area shows a summary bar for "Inv1" with details: "Brunswick, 8 Cases, 0 Units, 2 Entries, 1,281.0" and "Unsent Orders Shown". Below this is a table with columns: Product, Item ID, Cases, Units, Discount, Hold, and Created. Two rows of data are visible, each with a checkbox in the left margin.

Product	Item ID	Cases	Units	Discount	Hold	Created
<input type="checkbox"/> Old Charter Eight 1 ltr/12	11113	5	0		N	9/21/07 11:14:41
<input type="checkbox"/> Old Charter Eight 1.75l/6	11112	3	0		N	9/21/07 11:14:36

Sales people that **review orders** before sending have **fewer errors**

Orders Pending

Pending: 2 orders							
Customer Name	CustID	Cases	Units	Entries	Ext Price	Hold	Ordered
<input type="checkbox"/> Brunswick	1206	8	0	2	1,281.03	N	9/21/07 11:14:41 PM
Pending Orders Total:		8 Cases	0 Units	2 Entries	1,28	Unsent Orders Shown	

Yellow bar means orders are pending

Send Orders



Send Orders via wireless broadband card in PC

Order Summary

The screenshot shows a software window titled "PA Order Connection" with a "View" menu and a "Close" button. The main area displays a table with the following data:

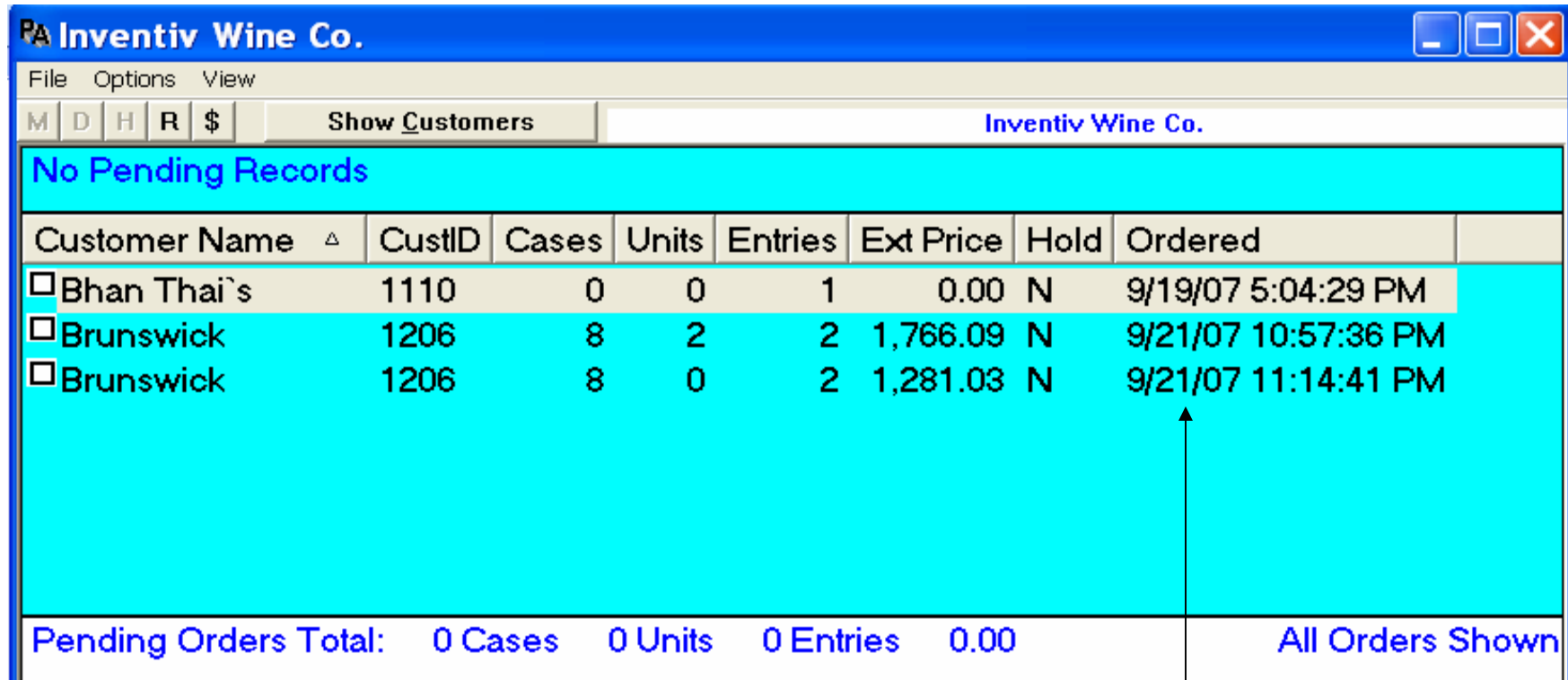
CoID	Cust...	Cust Name	ProdID	Product Name	Cases	Cases Confirmed	Units	Units Confirmed
01	1206	Brunswick	11112	Old Charter Eight 1.75l/6	3	3	0	0
01	1206	Brunswick	11113	Old Charter Eight 1 ltr/12	5	5	0	0

A "Summary" dialog box is overlaid on the table, containing the following information:

- 2 orders filled.
- 0 orders partially filled.
- 0 orders not filled.
- 0 orders with errors on the server.
- 0 orders with errors on this computer.
- 0 orders not processed.
- 0 payments successfully sent and processed.

Confirmation with status of each line item – Filled – Partially Filled – Not Filled

Sent Order Summary



PA Inventiv Wine Co.

File Options View

M D H R \$ Show Customers Inventiv Wine Co.

No Pending Records

Customer Name Δ	CustID	Cases	Units	Entries	Ext Price	Hold	Ordered
<input type="checkbox"/> Bhan Thai's	1110	0	0	1	0.00	N	9/19/07 5:04:29 PM
<input type="checkbox"/> Brunswick	1206	8	2	2	1,766.09	N	9/21/07 10:57:36 PM
<input type="checkbox"/> Brunswick	1206	8	0	2	1,281.03	N	9/21/07 11:14:41 PM

Pending Orders Total: 0 Cases 0 Units 0 Entries 0.00 All Orders Shown

Order Summary – Displays last 15 days for reference

Orders are time stamped “Written” and “Ordered”

Key Features

- Inventory is refreshed daily
- Pricing can include contracts and discounts
- Available sales history
 - Last 12 months
 - Last 3 months
 - Current month
 - Last year next month
 - Custom fields
- Sales territories can be customized
- Management reports are available to track orders placed by time of day and sales rep
- Products can be sequenced based on customer layout to speed order time or scanners can be used
- Custom survey capabilities
- Training only takes 1-2 hours

Products

- PocketAdvantage
 - For any Windows based PC or handheld