



# CARGAS ENERGY PRODUCT GUIDE

Cargas Energy is premier back-office software and mobile applications built for fuel delivery and HVAC service companies. Our solution manages propane, heating oil, and motor fuels and any customer, from residential to commercial. Built on the latest in mobile and web technology, Cargas Energy helps businesses across the country achieve better results faster and easier than ever before.



# WHAT SETS US APART

**Usability.** Our software was designed with usability in mind. It looks and acts like the modern applications you use everyday, so it's easy for your team to learn and use.

**Anytime access.** Cargas Energy is browser-based, so you can access it anytime, anywhere, from any device.

**Real-time information flow.** Communication between our back-office software and mobile applications is instantaneous. Your drivers and technicians will receive new routes, route updates, and price changes immediately on their mobile devices, and their progress will instantly be recorded in the back office.

**All in one.** Everything from routing and dispatching to customer account management and statement printing is handled directly in Cargas Energy. Our mobile solutions and back-office software were designed and built together, so they work together as one system.

**Built for acquisition.** Cargas Energy offers the flexibility you need to manage your growing business. When you acquire, you don't have to maintain a separate database for your new acquisition—you can consolidate everything in one system. Or, take advantage of our divisional security to segment user access by division or location.

**Streamlined upgrades.** Upgrades are managed remotely and scheduled for a time that's convenient for you so they don't impact your daily operations. We're continuously making improvements, and you'll automatically receive the latest features and bug fixes with each update.

**Integration capabilities.** We have a vast partner network with pre-built integrations to other industry-leading solutions, while our robust web APIs make it easy to build custom integrations between Cargas Energy and any other solution you use to run your business.



A woman with blonde hair, wearing a bright pink long-sleeved shirt, is shown in profile from the chest up. She is holding a black telephone receiver to her ear with her right hand. In the background, there is a blurred office environment with computer monitors and desks. The overall lighting is soft and professional.

# CUSTOMER SERVICE

---

## A Better Customer Experience

Cargas Energy's Customer Service functionality offers a full set of customer account management features that are easy to learn and use. With a streamlined account screen and intuitive navigation, your CSRs have the most important information at their fingertips, with easy access to details and action menus when they need them. Setup wizards simplify even the most complex processes with step-by-step instructions.

# CUSTOMER SERVICE

## Key Benefits

**Easy to navigate and use.** Our customer account screen provides an at-a-glance summary of each account, with drill-down capabilities to instantly reveal details when needed. The streamlined navigation shows only the items that have been set up for the account you're viewing instead of cluttering your screen with an endless list of options. Your CSRs will have quick access to action menus, alerts, activity, and a list of recently accessed accounts.

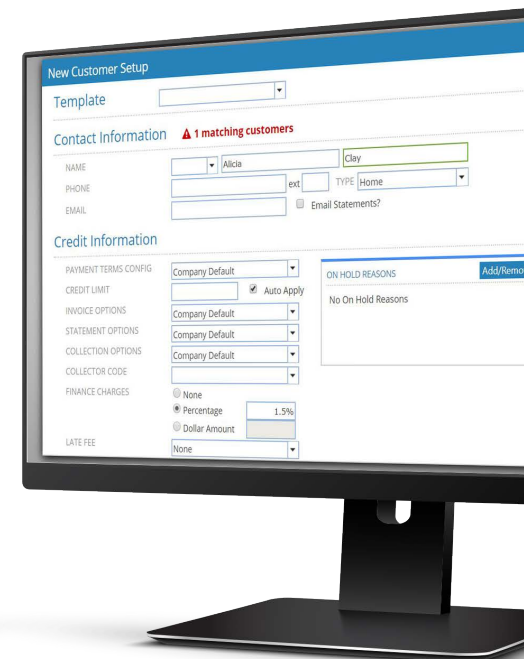
**Everything in one place.** There's no need to juggle multiple accounts for the same customer. One account can manage multiple locations or tanks, different types of fuel, and both delivery and service contracts.

**Setup wizards.** It's easy to create new customers, budget plans, service contracts, and more with setup wizards that walk you through the process. Customizable templates allow you to tailor each process to your business.

**Divisional security.** You control the access your team has. Allow your CSRs to pull up any account, or use divisional security to set parameters based on division or location.

## Feature Highlights

- All Account Info in One Place
- Quick-Action Menus
- Pop-Up Alerts
- Quick Facts & Notes
- Recent Account Activity
- Recently Opened Accounts
- Auto On/Off Hold
- CRM Integration





# MOBILE DELIVERY

---

## More Gallons, Fewer Miles

Cargas Energy's Delivery Center gives you the tools to transform the way you deliver fuel. With smart forecasting and route optimization, you're equipped to deliver to the right tanks at the right time in the most efficient way possible. Replace paper tickets and outdated technology with mobile technology that lets you work in real time with your drivers and gives you the flexibility to make changes instantly.



# MOBILE DELIVERY

## Key Benefits

**Integrated routing.** Our Route Builder is seamlessly integrated to our Delivery Center so you can manage ticket pulls, routing, and dispatching from one place. Build routes in minutes with intuitive ticket selection filters and visual mapping, plus advanced features like the ability to identify the best route to add an emergency will call stop to.

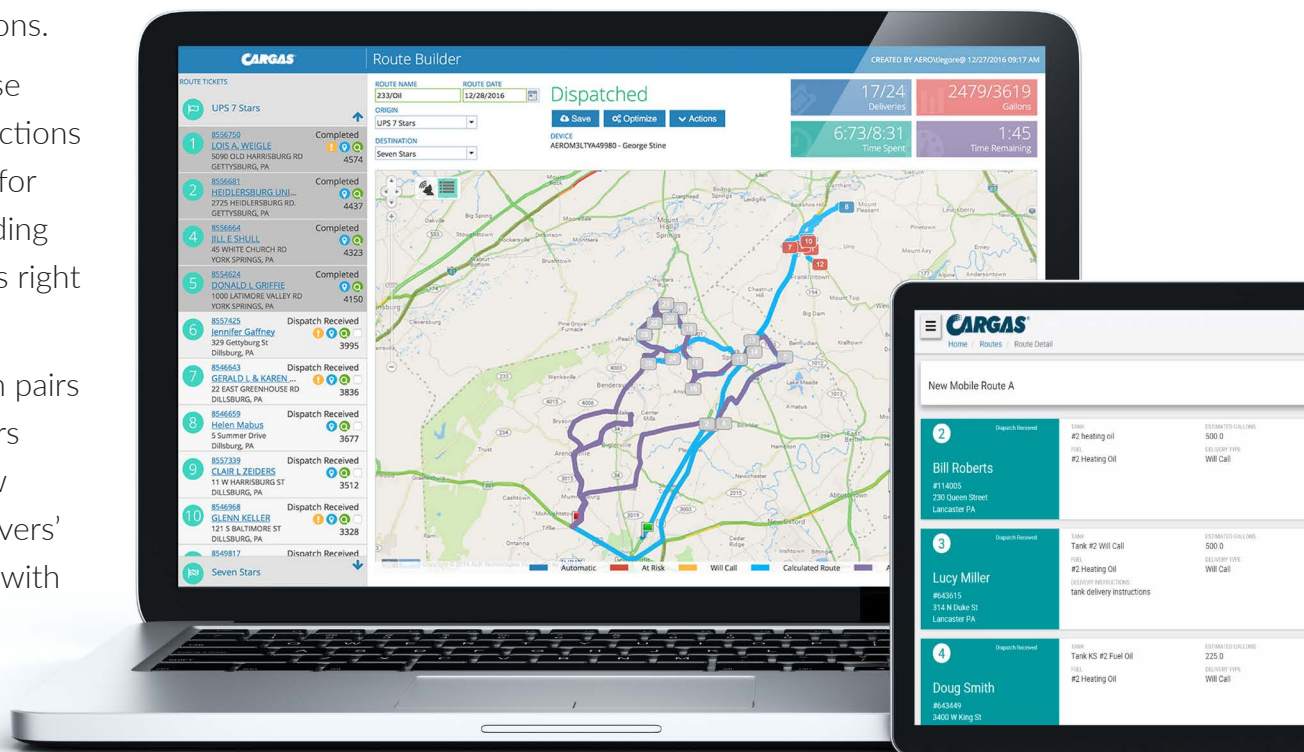
**Route optimization.** Achieve ultimate delivery efficiency with route optimization that accounts for origin and destination points and live traffic, as well as Hazmat and truck restrictions.

**Smarter forecasting.** Customizable K-factor and base load forecasting allows you to fine-tune usage projections based on season and location, with additional tools for advanced calibration. Integrations with industry-leading tank monitoring systems allow you to see tank levels right in Cargas Energy.

**Mobile application.** Our Mobile Delivery application pairs with our back-office software so you and your drivers are always on the same page. Instantly dispatch new routes, route updates, and price changes to your drivers' mobile devices, and track their progress in real time with geolocation and completed ticket notifications.

## Feature Highlights

- Manage All Delivery Tasks in One Place
- Easily Identify At-Risk Tickets
- One-Click Dispatching and Posting
- Track Each Driver's Progress in Real Time
- Customizable Grids
- Playback Shift History
- Print Shift Reports







# HVAC SERVICE

## Service Management Simplified

Cargas Energy's HVAC Service functionality streamlines service management so you can drive revenue with your appliance and install operation. The intuitive drag-and-drop dispatch board makes scheduling easy, while the mobile application lets you work with your technicians in real time. With inventory management, flat rate or time and materials billing, and work order and task management, your team has all the tools to get the job done.

# HVAC SERVICE

## Key Benefits

**Intuitive dispatch board.** Our dispatch board makes job-matching easy. Assign qualifications to technicians and search for availability or pair them with open work orders accordingly. Simplify scheduling with a drag-and-drop calendar.

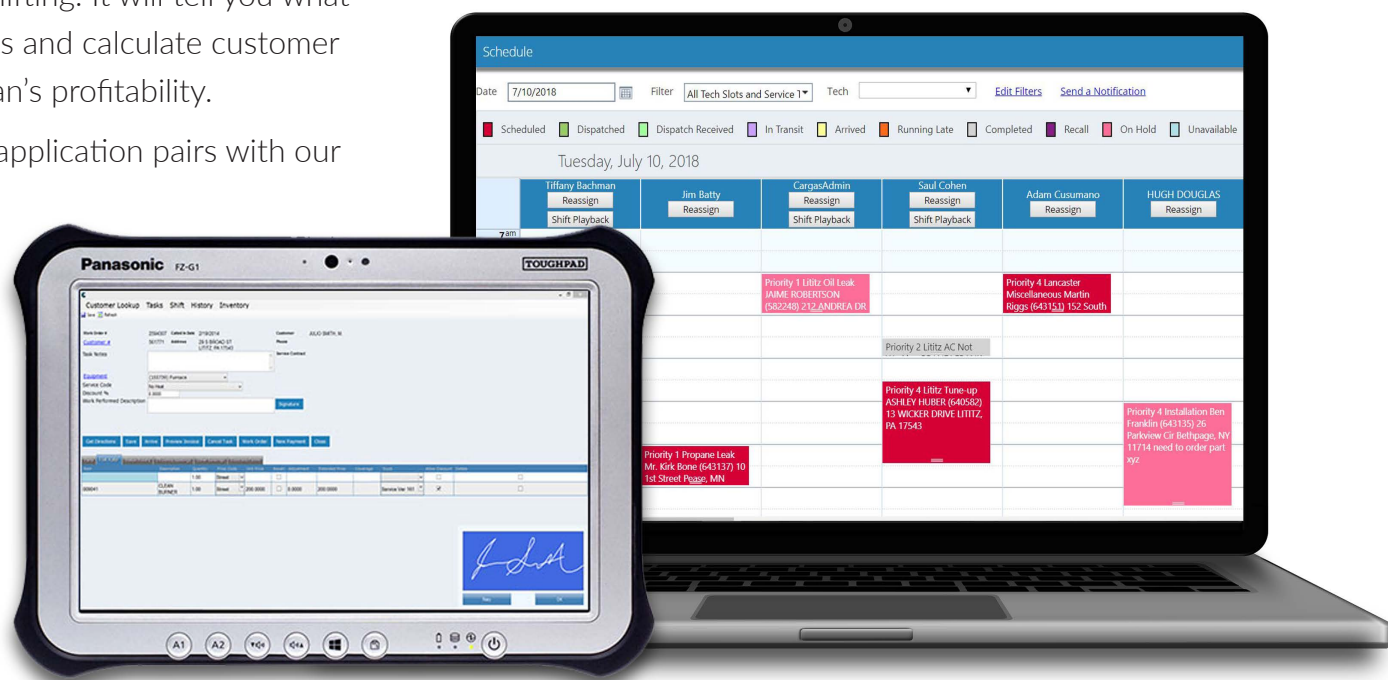
**Real-time parts inventory.** Track inventory levels for all parts in real time, whether they're on your trucks or in your warehouse. EDI integrations with part vendors allow you to set parameters for automatic reordering so you never risk running out.

**Robust service contract capabilities.** Set up your service contract terms and let the software do the heavy lifting. It will tell you what parts are covered under specific contracts and calculate customer bills accordingly. And it will track each plan's profitability.

**Mobile application.** Our Mobile Service application pairs with our back-office software so you and your technicians are always on the same page. Track their progress in real time throughout the day, locate the nearest technician for emergencies, and dispatch work orders via text.

## Feature Highlights

- Real-Time Service Work Order Dispatching
- Work Order Texting
- Real-Time Inventory Tracking
- Automatic Parts Reordering
- Exhaustive Work Order History
- On-Site Signature Capture
- TankSure and Gas Check Digital Forms
- Installment plans
- Intelligent Zone Mapping





# CYLINDER EXCHANGE

A blue truck is shown from the side, parked under a corrugated metal roof. The truck's cargo area is filled with several racks of white gas cylinders. The racks are blue and have multiple levels. The cylinders are arranged in rows on each level. The truck is white with blue accents. The background shows some greenery and a clear sky.

## Tracking Inventory Like Never Before

Cargas Energy's Cylinder Exchange functionality puts you in the driver's seat, allowing you to build the pricing structures and exchange schedules you need for your business. Manage ticket pulls, routing, and dispatching from one place through our Cylinder Exchange Center. Using the latest mobile technology, track everything in real time, from inventory to exchanges.

# CYLINDER EXCHANGE

## Key Benefits

**Flexible pricing and scheduling.** Build the pricing structures and exchange schedules you need based on criteria you set, like discounted pricing for bulk exchanges or a more frequent exchange schedule for high-volume consumers.

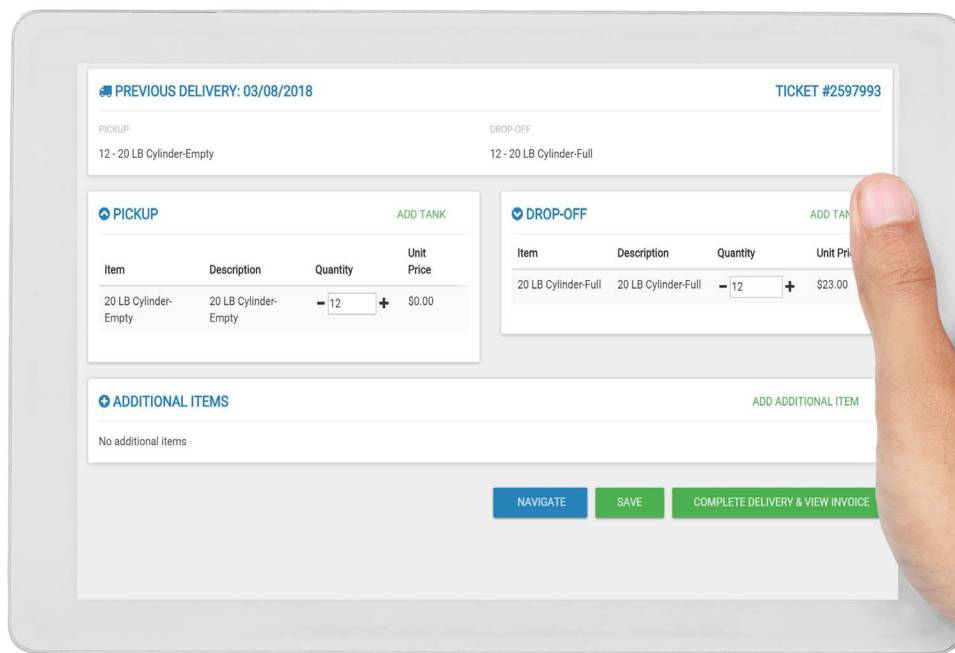
**All-in-one exchange management.** Our Cylinder Exchange Center has integrated routing so you can manage ticket pulls, routing, and dispatching from one place. Intuitive selection filters help you identify customers due for an exchange, or add will call tickets as needed.

**Real-time inventory tracking.** Get an accurate count of all your tanks in real time. Updates from the mobile app appear instantly in the back office as drivers make exchanges, so you're never in the dark.

**Mobile application.** Our Cylinder Exchange application works in sync with our back-office software, so you and your drivers are always up to date with the latest information. Track exchange progress throughout the day, instantly dispatch new routes, or make route updates to accommodate changes or emergency stops.

## Feature Highlights

- Flexible Pricing Structures
- Manage All Exchange Tasks in One Place
- One-Click Dispatching and Posting
- Real-Time Inventory Tracking
- Loading, Unloading, and Filling
- Onsite Billing and Signature Capture
- Email Invoicing
- Turnover Rate Analysis







# EXTENDED FEATURES

## One Solution for All Your Needs

Cargas Energy can handle everything from a small residential business to a large commercial operation.

Our extended feature set is available to help you manage complex processes with ease, from wholesale deliveries to fleet fueling.

# EXTENDED FEATURES

**Wholesale delivery.** Cargas Energy offers a dedicated wholesale dispatch board so you have one place to efficiently manage your commercial department's activities. Your margin on each wholesale ticket is automatically recorded so you can track fuel costs from the point of origin all the way to your end customers. See a list of available suppliers, ranked by price, with freight and other costs added in so you can always find the best price. Add multiple sources for wholesale tickets for the ultimate flexibility and allow the software to calculate the cost based on each source line. Our solution even manages third-party carriers, including calculating the freight and surcharge cost into your total cost of delivery.

**Cardlock.** We've partnered with the leading cardlock vendors in the industry, including CFN, FuelMaster, Pacific Pride, and more, to build seamless integrations between their solutions and Cargas

Energy. With our cardlock integrations, you can see all cardlock transactions directly in Cargas Energy and produce comprehensive invoices and statements for your customers with details like card number, transaction location, and transaction time.

**Fleet fueling.** Simplify your fleet fueling services by handling all of your pricing and billing directly in Cargas Energy.

**Propane meter reading.** Our mobile application allows you to enter propane meter readings from the field and transmit them to the back office in real time. The software automatically calculates gallons used based on the meter system you're using and generates statements and bills for your customers. Manage the inventory of your community tank easily based on the recorded meter readings.

The image displays three overlapping screenshots of the Cargas Energy software interface, showcasing various modules:

- Post Card Lock Sales:** A form for entering sales data. Fields include Ticket, Account #, Date, Fuel Code, and a filter for 10.00 gallons. Buttons for 'Go', 'Post All Sales', 'Refresh', 'Save', and 'Cancel' are visible.
- Meter Lookup:** A form for searching meter data. Fields include Community, Meter Tank, Serial Number, Customer #, Address, and checkboxes for 'No Unposted Meter Reading' and 'Show Inactive'. A 'Go' button is present.
- Wholesale Dispatch:** A dashboard for managing wholesale transactions. It includes a top navigation bar with 'Customer', 'Delivery', 'Service', 'Other', 'Inventory', 'Reports', and 'Admin'. The main area features a 'Wholesale Dispatch' title, a 'Grid Configuration' dropdown, and a table of transactions.

Doc ID	Ticket #	Documer	Customer #	Customer	Item	Salesperson	Driver	Truck	Wholesale Zc	Location Na
2591451		Wholesale	643045	Joe's	REG U/L GAS 87		LYDIA MANN	Truck 1	Lancaster	
2591600	2591600	Wholesale	643045	Joe's	REG U/L GAS 87		LYDIA MANN	Truck 1	Lancaster	
2591602	2591602	Wholesale	643045	Joe's	REG U/L GAS 87		LYDIA MANN	Truck 1	Lancaster	
2591775	2591775	Wholesale	643045	Joe's	Unleaded 87 Oct		LYDIA MANN	Truck 1	Lancaster	
2591778	2591778	Wholesale	643045	Joe's	Unleaded 87 Oct		LYDIA MANN	Truck 1	Lancaster	
2591908	2591908	Wholesale	643045	Joe's	LOW SULPHUR D		LYDIA MANN	Truck 1	Lancaster	
2591910	2591910	Wholesale	643045	Joe's	LOW SULPHUR D		LYDIA MANN	Truck 1	Lancaster	
2592127	2592127	Wholesale	643045	Joe's	#2 Heating Fuel		LYDIA MANN	Truck 1	Lancaster	
2592129	2592129	Wholesale	643045	Joe's	#2 Heating Fuel		LYDIA MANN	Truck 1	Lancaster	





## Intuitive and Easy to Use

Cargas Energy is premier software and mobile technology for fuel delivery companies, featuring customer account management, smarter delivery forecasting and routing, inventory management, and more. Cargas Energy is intuitive and easy to use and accessible anywhere, from any device. Cargas Energy improves efficiency and transforms operations, allowing you to grow your business and better serve your customers. Visit our website to learn more about our offerings.

[cargasenergy.com](http://cargasenergy.com)

