



**CARGAS<sup>®</sup>**

# 5 WAYS MODERN SOFTWARE CAN **HELP YOU ACHIEVE RECORD RESULTS**

2020 WINTER READY GUIDE

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# WINTER IS COMING

Are you prepared to deliver a record number of gallons this year? Leading companies in the industry are turning to technology to stay ahead of the competition this season and all year round. Modern back-office software designed to handle today's challenges can bring your company's efficiency and productivity to peak levels with the resources you already have. Here are 5 ways the right back-office software can transform your winter season.



## WINTER READY 01:

# BOOST MARGINS

Maintaining your margins is crucial to maintaining profitability. Modern back-office software helps you identify what your margins are and maintain them during a busy winter season.

### KNOW YOUR MARGINS

The truth of the matter is, most companies don't know their true daily margin—because their antiquated software is not able to provide that information. Back-office software built on modern technology, like Cargas Energy, tracks inventory in real time so you know the cost of each delivery based on the recorded inbound cost of the fuel. The right back-office software also offers insight through its reporting capabilities. An accurate margin report, like Cargas Energy's Delivery Profitability report, will give you a breakdown of your margins by delivery and help you see when you need to make adjustments.



## WINTER READY 01: BOOST MARGINS

### SAY GOODBYE TO PRICE UPDATE HASSLES

Due to the volatile nature of the industry, your delivery manager might be forced to watch the current rack price constantly for fear of missing out on price changes. And with outdated delivery software, all prices have to be entered manually, so every price change is a time-consuming hassle. Cargas Energy eliminates this egregious inefficiency by making real-time price updates a reality. **Instant** and **automatic** price updates keep your margins rock solid by ensuring your customers always receive the latest and most accurate price.

**Automatic updates.** Cargas Energy integrates with automatic price update services like DTN and OPIS so there's no need to constantly check fuel prices or manually make changes in your system. Instead, price updates are recorded in the back-office software automatically.

**Instant updates.** Delays in disseminating price updates can keep you from hitting your gross margin target. When a fuel price is updated in Cargas Energy, the software instantly applies the new price to all outstanding delivery tickets—even those that have already been dispatched to your drivers.

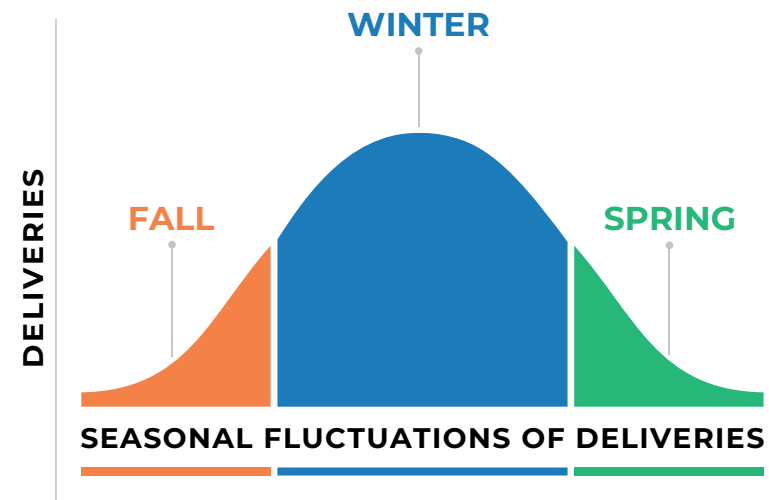
## WINTER READY 02:

# INCREASE DELIVERY EFFICIENCY

It's common practice to reduce operating costs by cutting the number of employees during the off-season when demand is low, but this is not the most effective way to improve your bottom line. It's massively disruptive to your business to rotate employees every season, and it doesn't make you more efficient during a busy winter. Instead of relying on seasonal employees, modern back-office software helps you deliver more gallons in fewer miles with the team you already have in place, so you benefit from reduced costs and increased revenue.

### FLATTEN THE CURVE

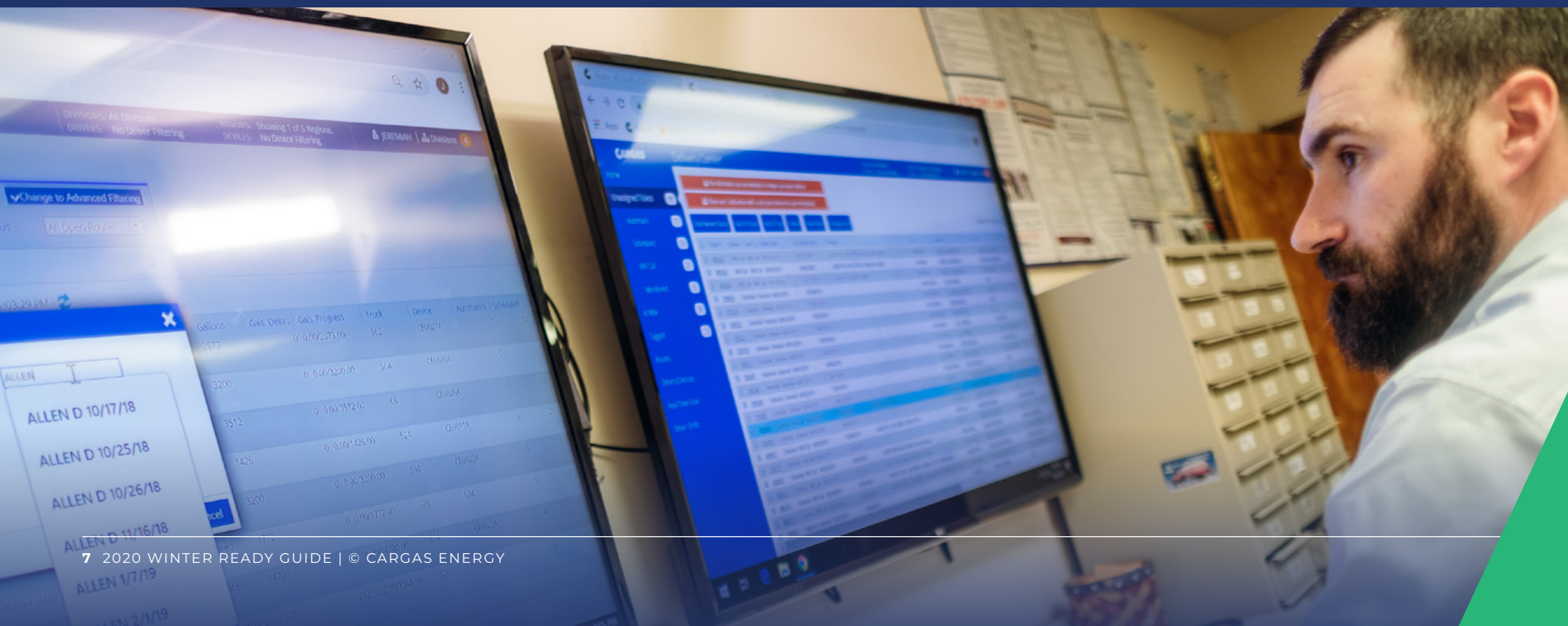
The adjacent bell curve illustrates a typical delivery cycle for most residential fuel delivery operations. In the fall, as temperatures begin to drop and demand begins to increase, many companies are too slow ramping up for the season, and soon operations are spinning out of control. By the time winter is in full swing, their dispatchers are furiously sending out inefficient routes full of suboptimal drops. Deliveries that



could have been scheduled earlier are suddenly in the mix with urgent winter deliveries. And with the flood of tickets, it's challenging to balance the needs of automatic and scheduled customers with the demands of will call requests.

## WINTER READY 02: INCREASE DELIVERY EFFICIENCY

Modern back-office software gives your dispatchers the tools they need to flatten the curve, like Cargas Energy's advanced Seasonal K-Factor functionality. This smart forecasting technology allows you to pull ahead based on K-factor and tank size so you can schedule more optimal drops for certain customers early in the fall, reducing the chance that they'll need a delivery in the thick of winter. This frees up your capacity during the winter season so you're better equipped to deliver to customers with high usage rates or urgent will call tickets. By flattening out the delivery curve, you keep your team busier in the fall before the winter season really ramps up and reduce your need for seasonal employees. This helps you maximize the productivity of the team you already have, while reducing stress for everyone.

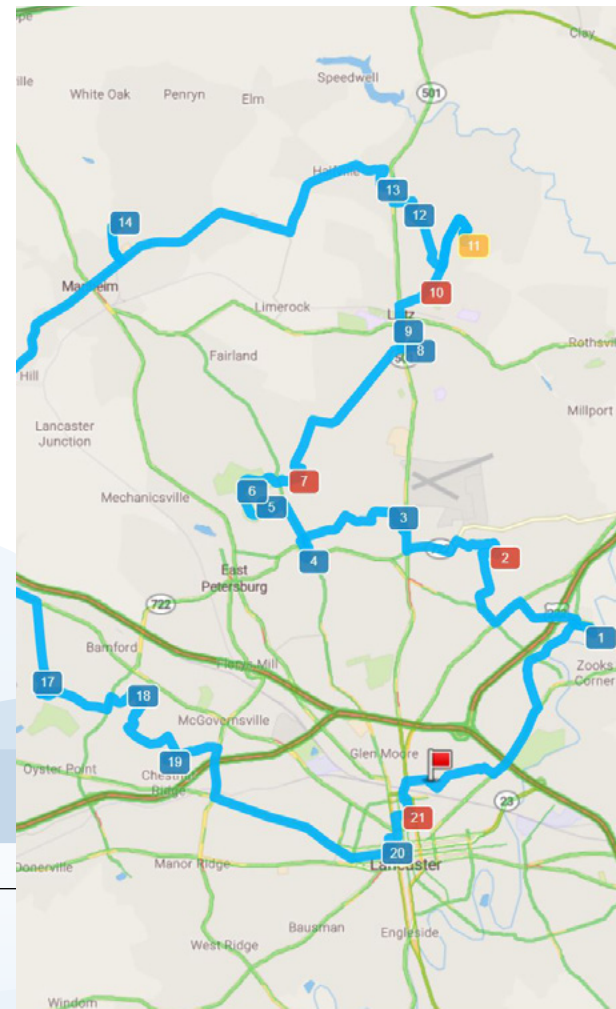


## WINTER READY 02: INCREASE DELIVERY EFFICIENCY

### ELIMINATE THE ROUTING CHAOS

Managing ticket pulls and routing during a busy winter season can be absolute chaos for a dispatcher. The volume is just too much, and it's often difficult to figure out where to fit in urgent will call tickets among automatic and scheduled deliveries. Without an effective tool to organize and prioritize tickets, important deliveries may be left pending while tickets with suboptimal drops are dispatched.

Cargas Energy features an **integrated routing system** that simplifies the routing process and eliminates the need to batch groups of tickets and export them to a separate routing application. Cargas Energy offers dispatchers a multitude of intuitive ticket selection filters so they can bring order to the chaos and ensure deliveries are being made to the right tanks at the right time. Dispatchers can plot tickets visually on a map, which makes routing decisions quick and easy. Cargas Energy's **"find nearest route"** feature makes it simple to add emergency will call tickets to an existing route by determining which driver or route is closest to the new delivery's location.



## WINTER READY 02: INCREASE DELIVERY EFFICIENCY

### EASILY CORRECT PROBLEM TANKS

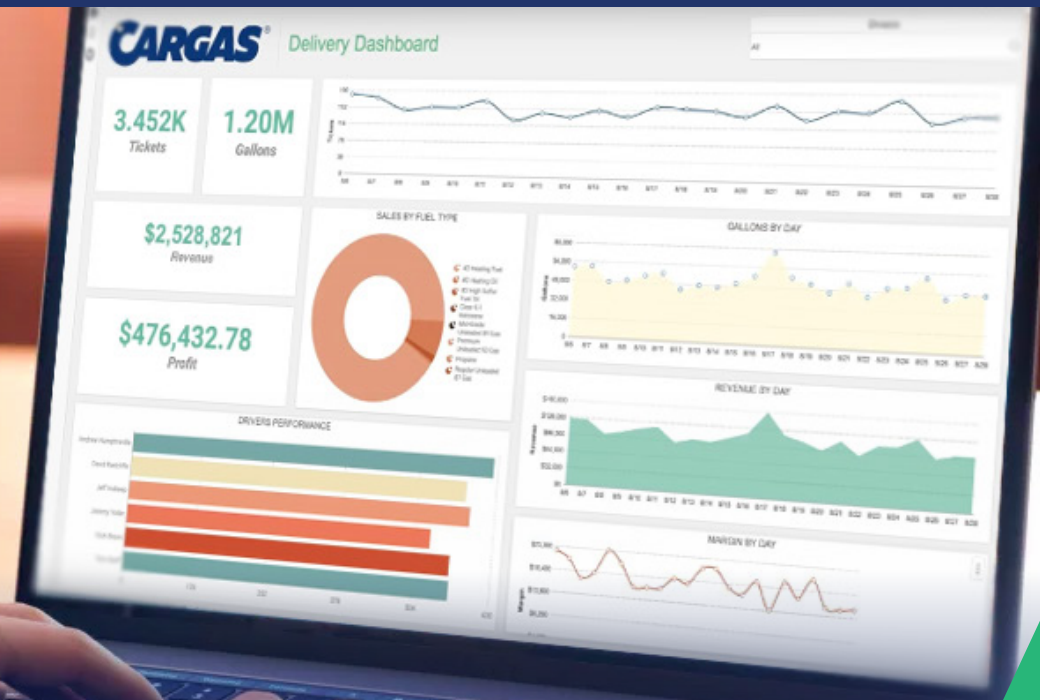
No matter how advanced your forecasting functionality is, you'll always struggle with delivery efficiency if you can't identify and correct projections for tanks that aren't behaving as predicted—the ones that always have small drops when your projections say they're in dire need of fuel and those that run out when your projections say they shouldn't need a delivery for weeks. Modern back-office software provides tools to help you fine tune your projections, like Cargas Energy's **K-Factor Exception report**. This report provides a list of tanks that fall outside your specified discrepancy range between projected gallons and what was actually delivered. Correcting the projections on these tanks ensures you are accurately identifying at-risk tanks and keeping your customers happy.

Flattening the delivery curve, streamlining routing, and optimizing projections all lead to **fewer peak days**. These are days when customer demand is greater than your capacity to meet it. The sheer number of peak days during a cold winter often masks inefficiencies—the demand is so great that you're making money despite the ineffective processes. But each peak day makes a dent in your profits. Modern back-office software gives you the tools to increase efficiency so you can decrease your number of peak days and boost your bottom line.

## WINTER READY 03:

# IMPROVE CASH FLOW

Cash flow is one of the most important indicators of a company's financial health, but not all companies realize the negative impact outdated back-office software can have on their cash flow. Because of system limitations or plain lack of features, antiquated software can make it difficult to get a true picture of your receivables and make collections. Modern back-office software comes equipped with tools to help you improve your cash flow.



## WINTER READY 03: IMPROVE CASH FLOW

### MANAGE DELINQUENT ACCOUNTS

How often do you accidentally deliver fuel to delinquent accounts simply because your back-office system is not capable of preventing those accounts from getting a delivery? Cargas Energy has an **automatic on/off hold feature** that places a hold on delinquent accounts when the on-hold parameters you specify are met, like 2 budget payments past due or 30 days past due. All tickets for on-hold accounts are still generated and grouped in one place so you can be proactive about collecting overdue balances before making any deliveries. When a customer turns their account into good standing by paying the balance owed, the software automatically releases the outstanding tickets for that account without any manual intervention. Cargas Energy's Mobile Delivery application always displays an account's hold status so drivers are up to date, preventing accidental deliveries to delinquent accounts, even for a customer who calls in after hours and has a ticket dispatched directly to a driver.



Actions Setup Reports Admin

Apply Credit  
Cardlock Sale  
Cylinder Fill Delivery  
Delivery  
Deposit  
Finance Charge  
Fuel Sale  
Meter Reading  
Misc Adjustment  
Part Sale  
Payment  
Redeem Loyalty Points  
Wholesale Delivery  
Work Order

erts 900042 | Active | No

#### Contact Information

Name:  
Email:  
Phone:  
Statement Address:

#### Customer Information

Division:  
Type:  
Acquired:  
Referral Source:

Open Transactions (4)

## **WINTER READY 03: IMPROVE CASH FLOW**

### **GET PAID FASTER**

Cargas Energy provides on-site signature capture and payment collection so you can settle a customer's bill immediately after completing a delivery or service work order. This eliminates any delay between service and payment and helps prevent confusion because the customer sees the bill while your driver or technician is on site to answer questions. With Cargas Energy, you can also add autopay schedules to a customer's account so you can automatically charge a credit card or withdraw money from the customer's bank account when a transaction is recorded. For additional flexibility, these schedules can be set to withdraw from different accounts depending on the type of transaction.

### **SPREAD IT OUT**

Cargas Energy has robust budget plan functionality that accurately projects a customer's gallon usage based on their historical usage over several years. The software includes tools that make creating, adjusting, and renewing budget plans pain free and easy to manage. You can even add non-fuel transactions to a budget plan. Budget plans spread a customer's payments evenly throughout the year so you're not stuck waiting for a big influx of cash over the winter months. With budget plans, you get paid more regularly and your cash flow improves.

### **END THE COLLECTIONS NIGHTMARE**

No matter what, you will always have delinquent accounts to deal with. Modern back-office software helps you manage the collections process and settle overdue balances without the usual headaches. Cargas Energy's Collection Assistant provides visibility into delinquent accounts and helps your collections department organize and prioritize them with a variety of powerful search filters. Add your chosen accounts to a collection workflow that walks the customer through a series of letters with escalating urgency levels.

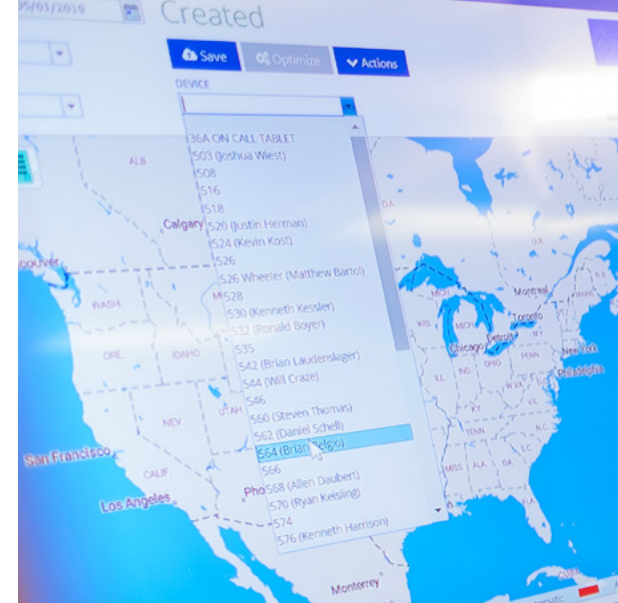
## WINTER READY 04:

# DIVERSIFY

In today's competitive market, many companies are seeking to diversify so they have multiple sources of revenue. Diversifying is a great way to maintain profitability, but it's not always easy to do if your back-office system is only equipped for fuel delivery. Modern back-office solutions offer a range of other capabilities to help you grow and expand your business.

### EXPAND YOUR CUSTOMER BASE

A great way to diversify is to expand your offerings. This opens the door to a whole new customer base outside of the typical residential fuel delivery customers most fuel dealers are already serving. Cargas Energy has full-featured **Cardlock**, **Fleet Fueling**, **HVAC Service**, and **Cylinder Exchange** modules that extend your offerings and enhance your footprint in the area you serve.



## WINTER READY 04: DIVERSIFY

### BOOST YOUR HVAC DEPARTMENT

HVAC/Service is often treated as a loss leader because it's notoriously difficult for service departments to achieve profitability. Yet many successful fuel delivery companies boast a robust and highly profitable service department, and a successful service operation can help maintain profitability during the off-season or a warm winter. A modern back-office system like Cargas Energy offers extensive features, including service contracts and flat rate billing, to streamline your service operation and help you achieve profitability.

**Service Contracts** and **Flat Rate Billing** are two key drivers of your service department's success. Service Contracts can be a steady revenue source for your company, while Flat Rate Billing eliminates confusing pricing schemes for your customers, streamlines the billing process, and is highly profitable. Cargas Energy offers extensive service contract and flat rate billing features to help you run your service department effectively.



## WINTER READY 04: DIVERSIFY

### SERVICE CONTRACTS

Set up multiple service contracts to suit your business and your customers. Each contract can cover specific types of equipment, and/or specific parts lists. Coverage for parts included in a service contract can be set up as a percent or a flat dollar amount.

- Customers can purchase multiple service contracts and use each contract to cover different pieces of equipment.
- In addition to parts, a service contract can cover flat rates, a great feature if your contract covers one tune-up a year.
- Charge the contract renewal fee annually or monthly depending on what's best for your business.
- Add service contract coverage fees to budget plans.
- A customer's contract coverage is visible on your technicians' handheld devices so they can check it in the field, as well as on the customer's invoice.
- Automatically apply service contract coverage during billing without manual calculations.

### FLAT RATE BILLING

The software automatically calculates the cost and inventory levels of your flat rate components.

- Set up flat rate task templates—a predetermined list of parts that can be purchased using the flat rate so your technicians can pick and choose the parts they need.

## WINTER READY 05:


# ENHANCE CUSTOMER SATISFACTION

The best way to outperform your competition is by keeping your customers happy. This is often an underrated aspect of making your company profitable, but even more underrated is the damage an outdated back-office system can do to your customer service efforts. Modern back-office software empowers your customer service representatives and improves your customers' overall experience.

### SEE EVERYTHING IN ONE PLACE

Customers expect you to have instant access to their account information, and it's incredibly frustrating when they have to wait on the phone as a CSR struggles to find the relevant details. With Cargas Energy, a complete, real-time view of any customer account is just a click away. Many older back-office solutions require you to set up multiple accounts for the same customer because the software can't handle multiple locations or requires you to separate delivery and service accounts. Cargas Energy allows you to bundle everything together so you have one account per customer, even if they have multiple tanks, locations, or contracts. Cargas Energy's account screen provides an at-a-glance summary for 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.



 **ANNOUNCEMENTS**  
Remember to log important call activity in the customer notes!  
Lunch will be served prior to the company meeting on Friday.

**TRAINING** erik@shelleroil.com (Erik Sheller) [Logout](#)

You have 16 outstanding course(s) to complete.

VIDEO: Service GPS Tracking	Not Started
VIDEO: Introducing the Small Balance Write-Off F...	Completed
SYSTEM TAX SETUP	Not Started
SERVICE INVENTORY MANAGEMENT	Not Started
SERVICE BILLING	Not Started
SERIALIZED INVENTORY MANAGEMENT	Not Started
INVENTORY MANAGEMENT BASICS	Not Started
FUEL PRICING SETUP (for version CE2016 and lat...	Completed
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## WINTER READY 05: **ENHANCE CUSTOMER SATISFACTION**

### **RESPOND INSTANTLY**

Cargas Energy gives you tools to quickly react to customer demand and make adjustments on the fly. When a customer needs an emergency delivery and your drivers are already out the door, your dispatcher can use Cargas Energy's real-time map view to see where your drivers are on the road and identify which one is closest to the new ticket's location. The dispatcher can add the emergency ticket to the most convenient existing route and send the route change instantly to the driver's handheld. Customer service representatives can see the current status of every ticket so they're prepared to answer customer questions.

### **STAY UP-TO-DATE**

Cargas Energy eliminates confusion and delays in capturing and updating customer information. The Mobile Delivery and Mobile Service applications feature on-site signature capture and invoice printing, allowing customers to see their bill quicker and helping you reduce mistakes. All completed delivery or service information is sent to the back-office in real time so dispatchers and customer service representatives always know the current status of activities in the field.



# ABOUT CARGAS

Cargas is an employee-owned software company with more than 150 employees. Cargas is the creator and provider of Cargas Energy, leading software for fuel delivery and HVAC service companies. With tools for fuel delivery, customer service, HVAC service, and cylinder exchange operations, Cargas Energy helps fuel dealers do more with the resources they already have so they can grow their businesses. Through its unique employee-owned culture, Cargas fosters a commitment to excellence, a dedication to teamwork, and a high level of customer care. Established in 1988, Cargas has continuously been recognized as a Best Place to Work. Visit us at [cargasenergy.com](https://cargasenergy.com).



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