



CARGAS[®]

2021 WINTER SURVIVAL GUIDE

| YOUR TECH TOOLKIT TO THRIVE
DURING HEATING SEASON

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WINTER IS COMING

Temperatures are dropping, and seasonal demand is about to hit its peak. Suddenly you're fighting the limitations of your fuel delivery system. Instead of capitalizing on the busy season, you're struggling to meet your customers' needs. What if you had better tools to manage winter demand? This guide highlights the capabilities you need from your fuel delivery software. With this tech toolkit in place, you can thrive, not just survive, during the heating season.





TOOLS TO MANAGE YOUR MARGINS

Understanding and maintaining your margins is crucial to maintaining profitability. If you don't know your margins, you don't know where you're making money—or where you're losing it. Your fuel delivery software should help you identify and maintain your margins throughout the winter season.



TOOLS TO MANAGE YOUR MARGINS

INVENTORY TRACKING

Do you know what your actual daily margin is? Your software should track inventory in real time so you know the cost of each delivery based on the recorded inbound cost of fuel.

MARGIN REPORTING

Your system's reporting capabilities should help you track your margins accurately. For example, you should be able to get a breakdown of your margins by delivery so you can see where you need to make adjustments.

INSTANT, AUTOMATIC PRICE UPDATES

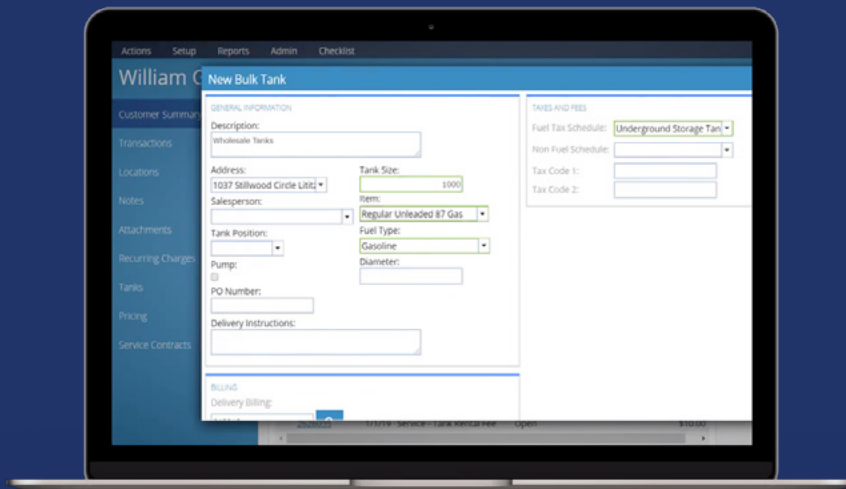
You shouldn't have to spend time monitoring the current rack price and manually making price updates in your delivery system. Your software should offer integrations to price update services like DTN and OPIS to record price updates in your back-office software automatically. Keeping your prices up to the minute protects your margins and ensures your customers always receive the latest, most accurate price.

PRICE UPDATES ON DISPATCHED TICKETS

Keeping prices up to date in the back office is just one piece of the puzzle. You may still miss your gross margin target if you can't get the latest price onto your delivery tickets. When a price change is made, your software should instantly apply the new price to all outstanding delivery tickets—even those already dispatched.

TOOLS TO IMPROVE DELIVERY EFFICIENCY

Does this sound like your business during the winter? Demand is so high that your dispatcher is furiously sending out inefficient routes with suboptimal drops just to get tickets out the door. The needs of will call and automatic customers are colliding. You're dealing with runouts or last-minute emergency deliveries to avoid runouts. To tackle peak demand, you need a fuel delivery system that helps you deliver more gallons in fewer miles with the team you already have.



TOOLS TO IMPROVE DELIVERY EFFICIENCY

SEASONAL K-FACTOR FORECASTING

To deliver to the right tanks at the right time, you need smart forecasting capabilities. Your fuel delivery software should give you options like K-factor and baseload and allow you to customize your forecasting based on the season. When it comes to winter efficiency, you should be able to pull ahead based on K-factor and tank size so you can schedule more optimal drops for some customers early in the fall. Prioritizing fall deliveries frees up your capacity during the winter season so you can deliver to customers with high usage rates or urgent will call tickets.

FORECASTING REPORTS

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. Your software's reporting capabilities should help you fine-tune your forecasts. For example, a K-factor exception report will show you which tanks had deliveries that didn't match your projected gallons so you can make adjustments.

EMBEDDED REPORTING

In general, your software system should give you easy access to the data you need to manage your business. It should be simple to run reports and queries or to build dashboards that provide at-a-glance insight. You shouldn't have to leave the software or spend hours compiling data in Excel to make sense of your business.

TOOLS TO IMPROVE DELIVERY EFFICIENCY

TICKET SELECTION FILTERS

It's challenging for dispatchers to manage ticket pulls and routing during peak season. Without an effective way to organize and prioritize tickets, they may leave important deliveries pending while dispatching tickets with suboptimal drops. Your software should provide intuitive ticket selection filters so it's easy for your dispatcher to prioritize deliveries and send drivers to the right tanks at the right time.

INTEGRATED ROUTING

Batching tickets and exporting them to a separate routing application takes up time you don't have. Routing should be incorporated directly into your fuel delivery software so you can handle the entire delivery process in one system instead of toggling back and forth.

VISUAL PLOTTING AND MULTI-ROUTE VIEW

Your fuel delivery software should allow you to plot tickets visually on a map to help your dispatcher make routing decisions. You should also be able to view multiple routes at once to identify opportunities for further optimization.

ROUTE OPTIMIZATION

Instead of sorting tickets into routes manually or leaving it in the hands of your drivers, your software should suggest the best order for each route while accounting for origin and destination points, reloading stops, live traffic, and HAZMAT and truck restrictions.

INSTANT ROUTE UPDATES

Can you quickly add a new stop to a driver's route? Your software should have the flexibility to add stops to dispatched routes so you can accommodate situations like an emergency will call delivery. The software should help you identify the route closest to the new stop and notify your driver of the change directly on their mobile device.

TOOLS TO INCREASE CASH FLOW

Cash flow is a significant indicator of a company's financial health. Still, you may struggle to get an accurate picture of your receivables and make collections without the right tools in place. Your fuel delivery software should help you manage collections and keep your cash flow more predictable.



TOOLS TO INCREASE CASH FLOW

AUTO ON/OFF HOLD

How often do you accidentally deliver fuel to delinquent accounts? Your software should allow you to select on-hold parameters, like thirty days past due, and automatically place a customer on hold if they meet any of those parameters. The software should group tickets for on-hold accounts so you can work proactively to collect overdue balances before making the deliveries. And, if a customer's account returns to good standing, your software should automatically release any outstanding tickets for that account.

ON-HOLD STATUS

A customer's on-hold status should not just be available in your back-office system. It should also be visible to drivers on their mobile devices. This way, even if a customer calls in after-hours and has a ticket dispatched directly to a driver, the driver has insight into the customer's hold status.

COLLECTIONS MANAGEMENT

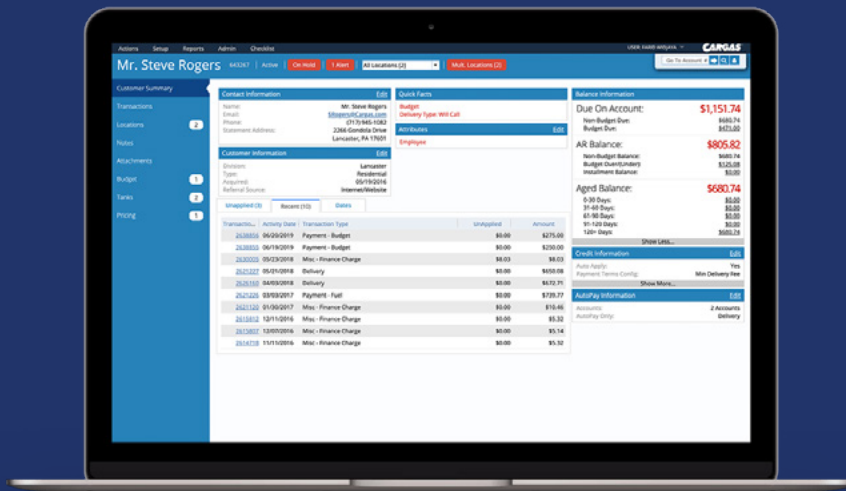
In addition to helping you manage on/off hold status, your software should provide insight into delinquent accounts and help your collections department organize and prioritize them with powerful search filters. The system should provide workflows to help automate the collections process, like walking the customer through a series of letters or emails with escalating urgency.

BUDGET PLAN MANAGEMENT

Budget plans spread a customer's payments evenly throughout the year so you're not stuck waiting for an influx of cash over the winter months. Your fuel delivery software should help you accurately project a customer's gallon usage based on their historical usage and give you a pain-free way to create, adjust, and renew budget plans.

TOOLS TO KEEP CUSTOMERS HAPPY

Your technology shouldn't come between you and your customers. Consumer expectations have shifted dramatically during the past decade, and if your fuel delivery system hasn't kept up, you may be missing the tools you need to support today's customers.



TOOLS TO KEEP CUSTOMERS HAPPY

UNIFIED CUSTOMER ACCOUNT MANAGEMENT

Your customer service team needs information at their fingertips. Your fuel delivery system should allow you to capture all customer information under one account, even if they have multiple locations, tanks, or contracts. The customer account screen should make it easy to view information at a glance, with the option to drill into details quickly. The account screen should never show you information that doesn't pertain to the customer you're viewing.

REAL-TIME MAP AND TICKET VIEW

Your office team should be able to see where your drivers are on the road and the status of each delivery ticket. With this insight, your dispatcher can add an emergency delivery to the most convenient existing route. And a customer service representative can answer questions about when to expect a delivery.

FLEXIBLE PAYMENT OPTIONS

Your fuel delivery software should include functionality like autopay, online bill pay, and credit card payments in the field to make payments quick and easy for your customers.

ON-SITE SIGNATURE CAPTURE

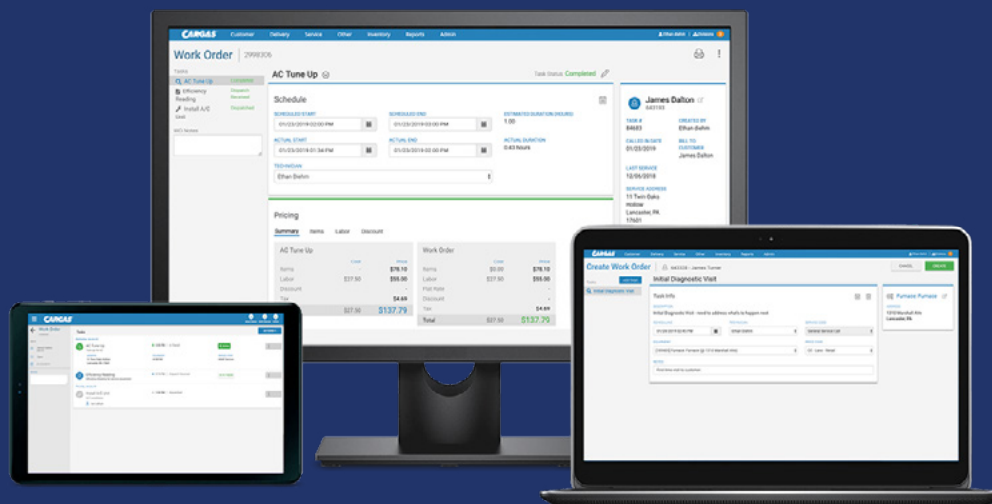
Your software should support signature capture and payment collection in the field so your drivers and technicians can settle a customer's bill immediately after a delivery or service work has been completed.

COMMUNICATION TOOLS

With tools like embedded texting or integrations to customer portals, you can easily share information with your customers. Your fuel delivery system should give you options to stay in touch.

TOOLS THAT GO BEYOND FUEL DELIVERY

In today's competitive market, you may have offerings outside of fuel delivery. While diversification can open up new revenue sources and help you maintain profitability, it's not always easy to do if your software system isn't equipped for it. A system that supports other business lines, like cylinder exchange, service, or HVAC service, gives you the flexibility to grow your business.



TOOLS THAT GO BEYOND FUEL DELIVERY

WORK ORDER MANAGEMENT

You should be able to organize and track your service work with tools like task templates, work orders, and workflows for specialty tasks like leak checks, diagnostic tests, and tank leases.

SERVICE SCHEDULING AND DISPATCHING

Your software should help you match technicians with open work orders, manage each technician's schedule, and group work geographically to improve efficiency.

INVENTORY MANAGEMENT

It should be easy to track your inventory. Your software should provide insight into the inventory levels of each warehouse and van and help you reorder parts when you need them with automatic parts reordering.

FLEXIBLE BILLING

You should have the flexibility to offer flat-rate billing, time and materials billing, service contracts, and installment plans, and your software should help you manage the details.

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 is continuously recognized as a Best Place to Work.



101 North Queen Street, Suite 300, Lancaster, PA 17603

717.560.9928

info@cargasenergy.com

cargasenergy.com

