FUEL DELIVERY

SOFTWARE BUYER'S GUIDE

Purchasing new software is all about finding the best fit for your needs and your business. If you're thinking about buying a new software system, our guide will prepare you for the process.

CARGAS®

CONTENTS

UNDERSTANDING CLOUD HOSTING

HOW DOES IT WORK?

"The cloud" really means a collection of internet-accessible servers. When you host software "in the cloud," the software lives on servers that are not located in your office building. Cloud service providers own the cloud servers, and you rent space on them to store your software and its data. You access the software through the internet using a web browser or an application. Facebook, Gmail, and TurboTax Online are all programs that live in the cloud.

Cargas Energy does not recommend on-premise servers, as they often require a significant upfront investment in hardware, software, and infrastructure. Additionally, ongoing maintenance, upgrades, and management can lead to higher operational costs over time.

COMMON QUESTIONS

What if the server goes down? Most cloud service providers have a 99% uptime or better. They use multiple servers and power sources, so if one part of the hardware or power goes down, there's a backup to take its place. Many cloud service providers offer additional protection like continuous backups, so if there is an interruption, your data is safe.

How secure is my data? Cloud service providers build their reputations on reliability and security. They invest more in security than most businesses would be able to afford on their own. Most providers offer encryption, authentication, and authorization to protect your data.

How are software upgrades handled? When software is hosted in the cloud, the provider can run maintenance, fixes, or upgrades from anywhere in the world—there's no need to access a server at your office. You schedule the upgrade for a convenient time and the provider handles the rest.

"We're usually first in line when there's a new beta offering. The Cargas software has propelled us forward like nothing else. We definitely made the right choice with Cargas. Ours truly is a success story."

– Mike Postich, CFO, Palmetto Propane

UNDERSTANDING CLOUD HOSTING

CLOUD BENEFITS

Anytime access. With software in the cloud, as long as you have an internet connection, you can access the software anytime, anywhere, on any device.

Instant communication. Because of its internet accessibility, software in the cloud communicates with mobile devices in the field instantly. You can get immediate status updates from drivers and techs, like ticket or work order completion, and they can receive instant updates from your back office, like route or price changes.

Better reliability and bandwidth. With a redundant server infrastructure and multiple power sources, cloud service providers can often offer better uptime than an on-premise server. And high-volume activity is easily spread out across the cloud, so you aren't limited to one server's bandwidth.

Better security and failsafes. With measures like encryption, authentication, and authorization, cloud service providers can often provide better security for your data than you can. And you get additional failsafes like continuous backups and disaster recovery plans.

Reduced costs. With software in the cloud, you save yourself the overhead of purchasing, maintaining, and upgrading an office server.

CARGAS ENERGY AND THE CLOUD

Cargas Energy is web-based software that is hosted in the cloud to give you all the benefits listed here. We work with reliable cloud hosting providers to ensure your data is secure and is always accessible from anywhere you need.

"The Cargas Energy software really stood out from the others. It was more user friendly, easier to navigate, and had mobile features that others did not."

– Shane Fortner, Operations Manager, Fortner Gas

UNDERSTANDING INTEGRATION

HOW TO BRING YOUR SYSTEMS TOGETHER

Integration means linking two different software programs so they can talk to one another and share information. For example, integrating your back-office software with your accounting software so the programs can share info like sales and cost of sales data for your financials. Integrations can be one way, with information only flowing in one direction from one program into the other, or two way, with information flowing freely between the programs.

INTEGRATION BENEFITS

Options. It's challenging to find one software program that has all the features you need. With integration, you can pick multiple programs and link them together to build your ideal solution.

No data silos. Without integration, your data lives in separate programs— even if it's the same information, like a customer's address. When your programs share information through integration, it's like having one system to store and manage data.

Efficiency. With integration, you can pull information from one program into another automatically, eliminating manual or duplicate data entry, errors, and conflicting data.

Collaboration. With integrated software, your team shares the same information, which keeps everyone on the same page.

Partner network. Many software providers have a network of other solutions with a pre-built integration to their software. This means you get the provider's software along with a range of other programs that it already works with.

"It's the people. I feel that the Cargas employees really care about their customers."

– Tiffany Bachman, Manager of IT Services, Santa Energy

UNDERSTANDING INTEGRATION

NOT ALL SOFTWARE IS INTEGRATION FRIENDLY

Older software was meant to work on its own. To connect it to another program, you need a developer to write additional linking code and the rules for communication between the programs. Once the integration is written, it's susceptible to breaking if you update either of the programs, because the update might change or overwrite the developer's code.

Modern software uses APIs for integration. API stands for Application Programming Interface, but really it's a connector piece used to link two software programs. APIs are basically pre-written rules of communication for software. Linking two programs with APIs is much easier and faster than writing the rules of communication from scratch. And because APIs are separate from the software itself, they aren't affected by upgrades. APIs form stable, long-lasting connections between software programs.

INTEGRATION AND CARGAS ENERGY

Cargas Energy has its own set of APIs, making it easy to integrate with other programs. It currently has pre-built integrations with Microsoft Dynamics 365 CRM, Salesforce CRM, and Sage Intacct Cloud. Its partner network includes industry-leading solutions for routing, meters, collections, customer portals, business intelligence, tax compliance, price updates, tank monitoring, cardlock billing, and parts management.

UNDERSTANDING MOBILE TECHNOLOGY

WHAT MODERN MOBILE MEANS FOR YOUR BUSINESS

Many back-office solutions offer mobile applications that can be used by your drivers and technicians in the field. The apps are installed on mobile devices like smartphones and tablets. When these devices are connected to the internet using wifi or a cellular data network, the mobile apps can communicate with your back-office software wirelessly. Most mobile apps also work offline and sync with your back office as soon as a connection becomes available.

ANDROID BENEFITS

An operating system is software that runs a computer, tablet, or smartphone and all of the programs on it. Android is the most widely used mobile OS, and here's why.

Mobile first. Because Android OS started its life as mobile software with mobile users in mind, it offers a much better mobile experience than other operating systems.

Better connectivity. Because Android was designed for mobile use, its mobile connectivity is more reliable than other operating systems.

App compatibility. Android leads the mobile OS market, so nearly every app created is compatible with it.

Easier to use. Because it was designed for mobile, Android OS is straightforward and intuitive for people to use. And the variety of Android apps offers quick and easy options to complete tasks outside of a web browser,

Less expensive. Android devices are some of the most affordable tools on the market, ideal for fuel dealers on any budget.
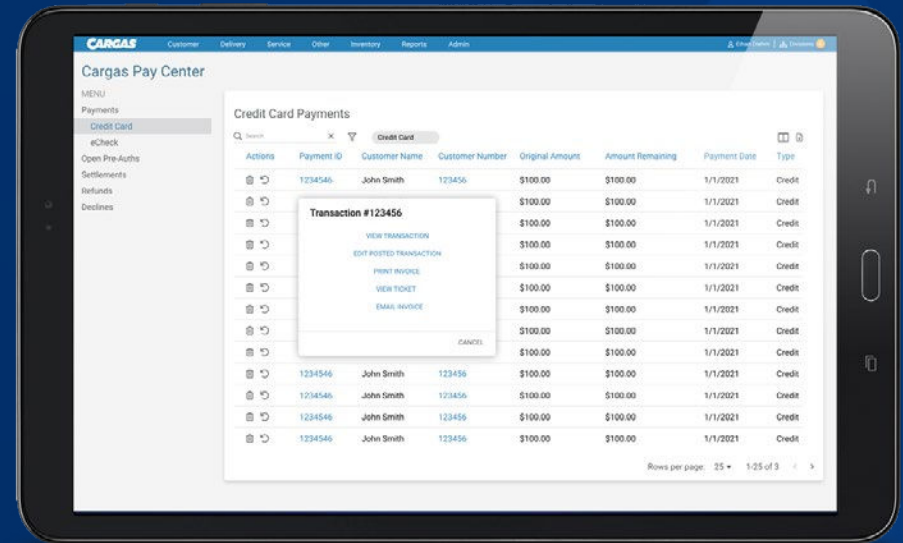
UNDERSTANDING MOBILE TECHNOLOGY

MOBILE TECHNOLOGY & CARGAS ENERGY

Android is the best operating system for optimizing fuel delivery software and related tools. However, some fuel delivery solutions were built before the age of wifi and cellular data networks, so their mobile component might not work like other modern solutions. For example, the mobile devices may have to be plugged in to the back-office system to sync instead of communicating wirelessly.

Cargas Energy's mobile applications are built on the Android operating system to provide the best combination of user experience, functionality, and performance. Our applications take advantage of wifi and cellular data networks to communicate in real time with our back-office software, giving you the flexibility to take action or make strategic changes quickly.

WHAT SETS CARGAS ENERGY 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 and use different logos based on brand or division.

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 you business.
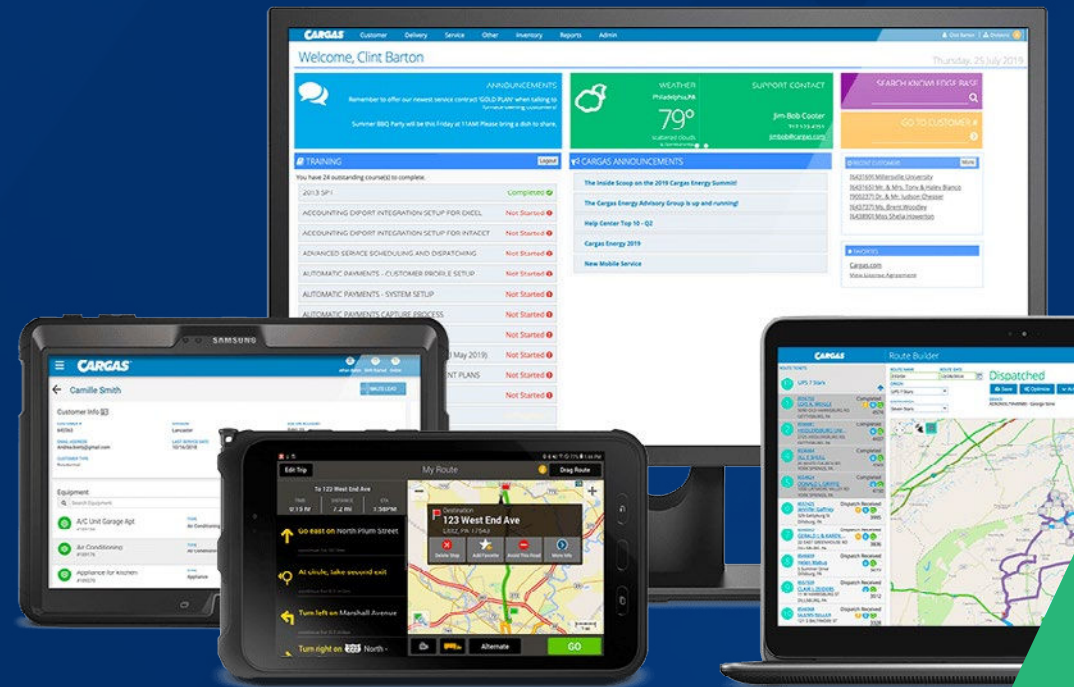
CUSTOMER SERVICE

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. There's no need to juggle multiple accounts for the same customer in Cargas Energy, since 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.

Customer communication tools. Set up automated, personalized messages for your customers with Cargas Energy's texting capabilities, and track conversations in the Message Center.

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
- Automated Text Messages
- Customizable Message Templates
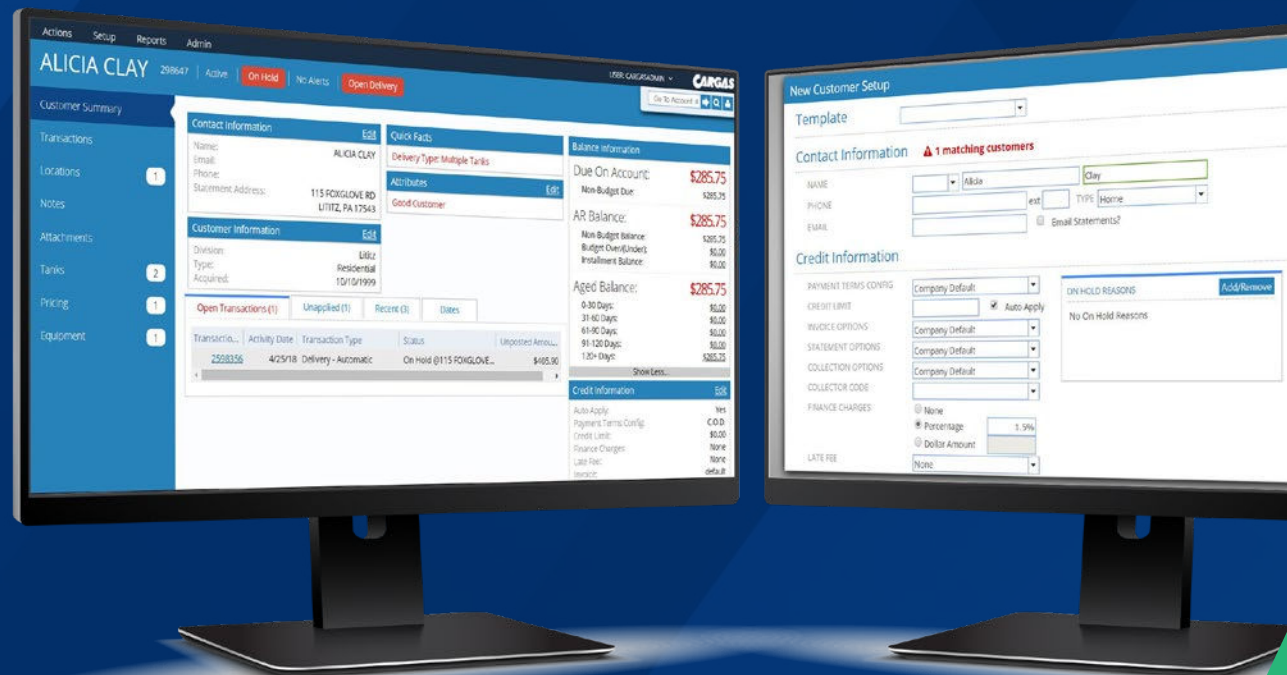
FUEL DELIVERY

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.

FUEL 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 for an emergency will-call stop.

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. Your routes will also optimize for reloading stops.

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.

Appointment notifications. Automatically send personalized texts to customers about upcoming delivery and service appointments. Include key information such as customer account data and images of technicians.

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
- Automatic Texts
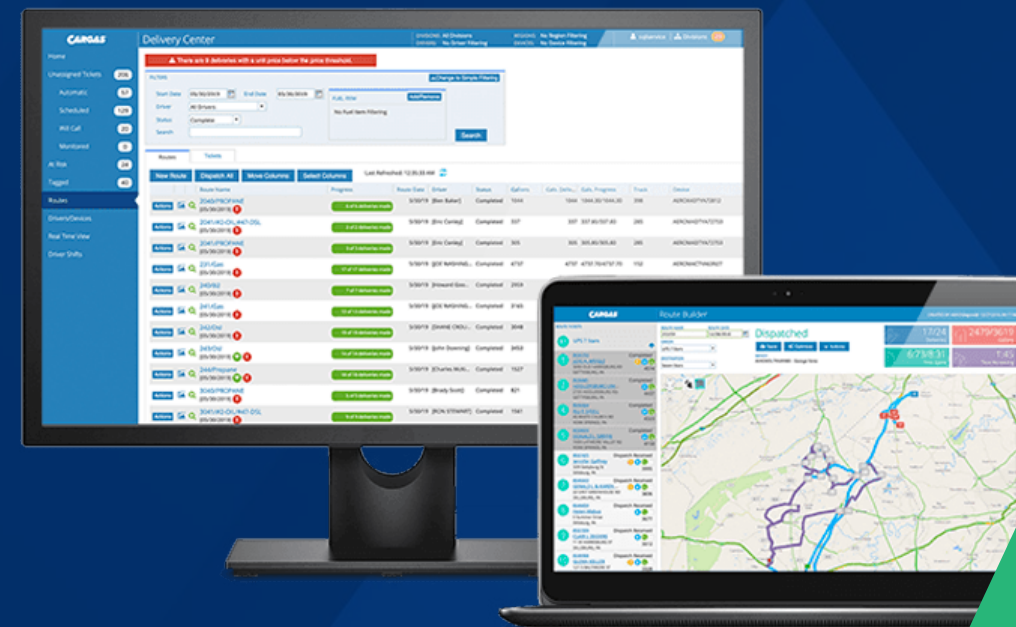
HVAC SERVICE

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 it needs 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.

Automated parts inventory. Automatically track inventory levels for all parts, 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, 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
- Serial Numbers
- Equipment Photos
- Automatic Parts Reordering
- Exhaustive Work Order History
- On-Site Signature Capture
- TankSure and Gas Check Digital Forms
- Installment Plans
- Intelligent Zone Mapping
- Quoting
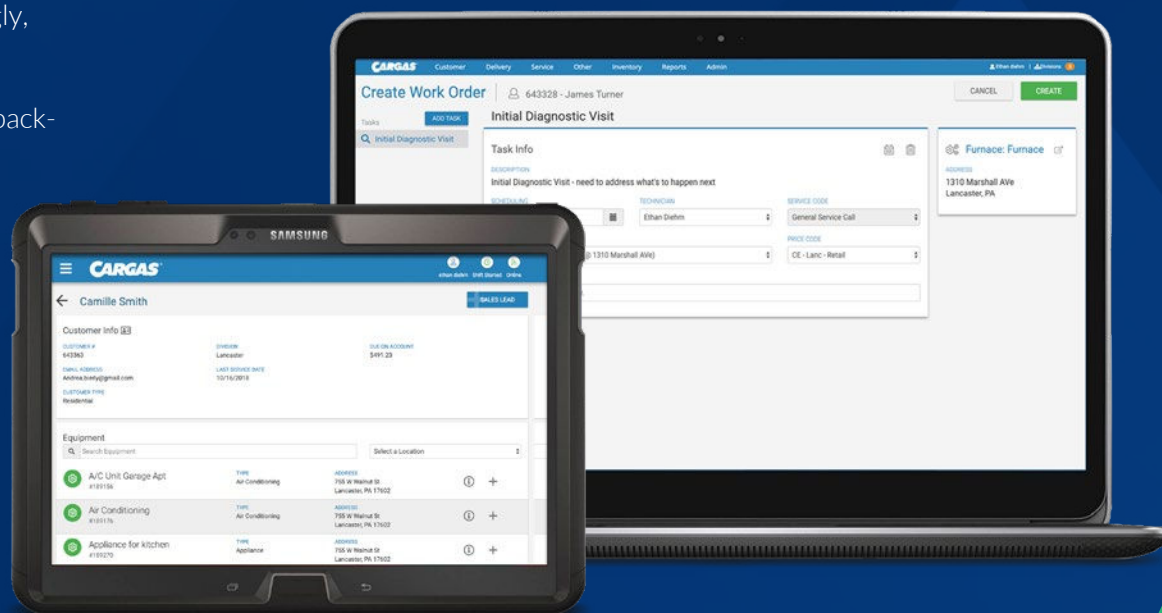
CYLINDER EXCHANGE

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
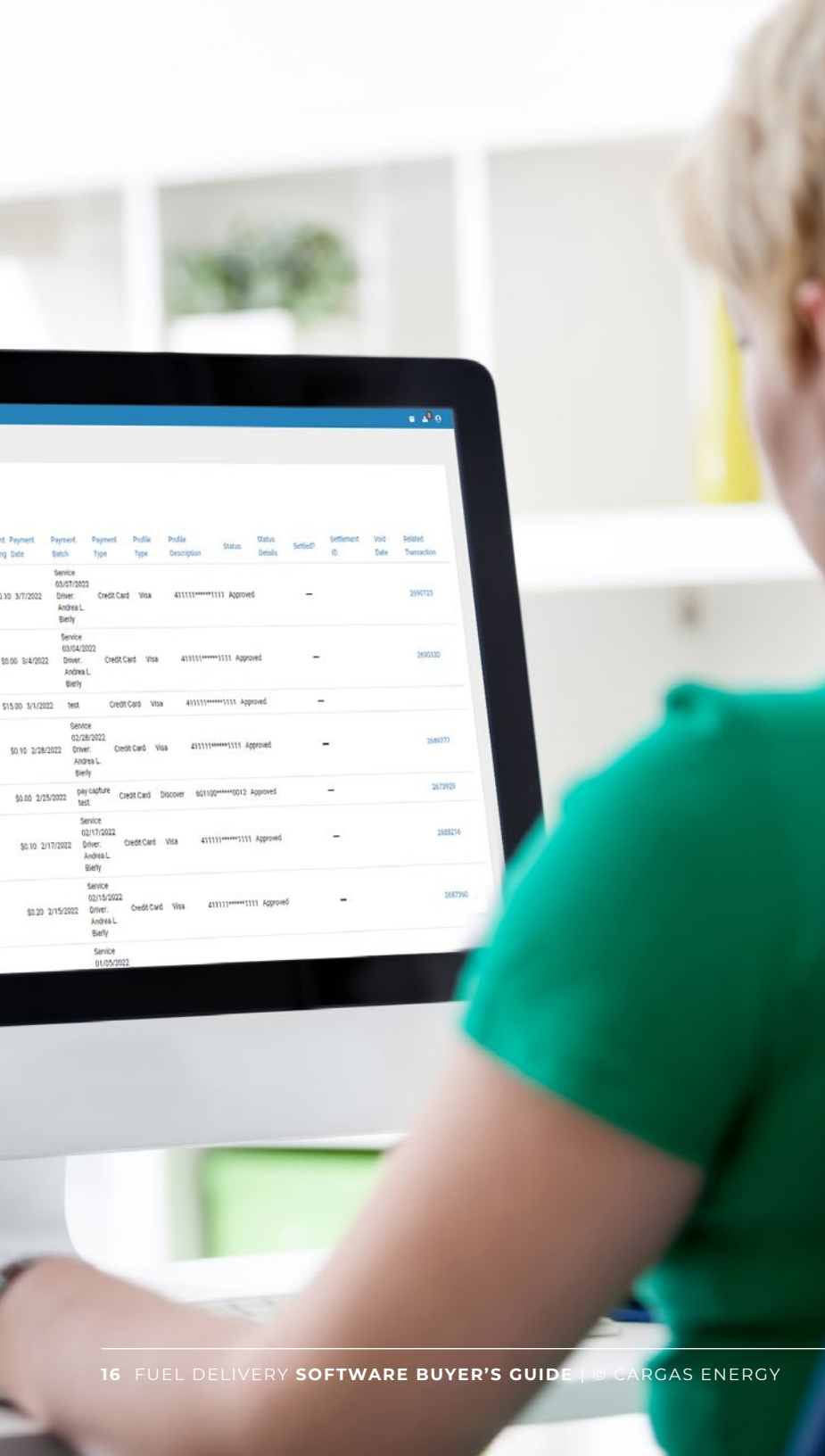- Email Invoicing
- Turnover Rate Analysis
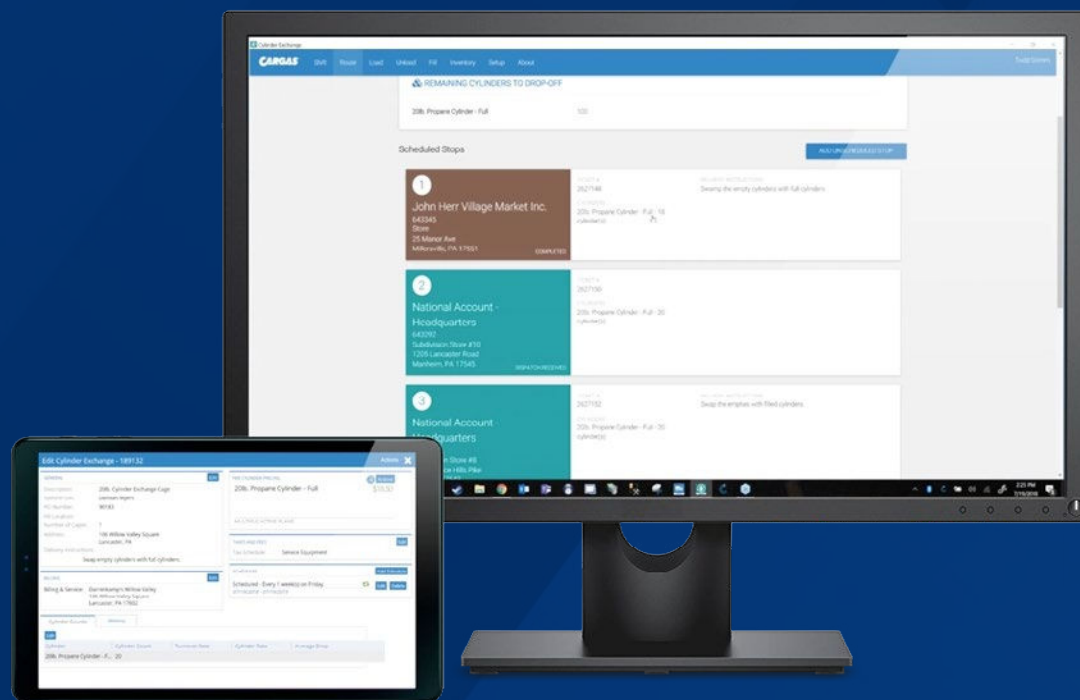
INTEGRATED PAYMENT PROCESSING

STREAMLINE PAYMENTS WITH CARGAS PAY

With Cargas Pay, Cargas Energy becomes your payments platform and Cargas becomes your payments facilitator. This means you don't need a separate payment gateway or processor—everything is managed directly within Cargas Energy. Even better, you'll know exactly what your costs are—all fees are available right in Cargas Energy, too.

CARGAS PAY

KEY BENEFITS

A simplified experience. Cargas Pay eliminates the need for multiple payments vendors by centralizing all payments with one partner—Cargas.

Time savings. All of your payments data is available on one platform, so you don't need to log out or jump between windows for a full view.

No hidden fees. Enjoy better and more transparent pricing, with transaction fees visible directly in the software.

Award-winning support. Whether you need assistance with Cargas Pay or Cargas Energy, our award-winning support team is standing by to help.

FEATURE HIGHLIGHTS

- Centralized Payments Dashboard
- Detailed Cost Breakdown of Each Payment Batch
- Bounced eCheck Wizard
- In-the-Field Credit Card Payment Processing
- Customer Portal Integration
- PCI Level 1 Security Compliance

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 board to track incomplete wholesale transactions. 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 and their prices, along 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.

Reporting and dashboarding. Cargas Energy's query tool allows you pull simple lists and reports easily. Once you've built a query, you can use it over and over again to keep track of the information that's important to you. In addition, ETL tables make it quick and easy to generate and share external reports. Cargas Energy continuously innovates its reporting and dashboarding capabilities to offer advanced features.

Point of Sale. Manage your retail storefront with a POS app specifically designed for propane dealers. Cargas Energy's POS app is fully integrated with the software's customer accounts, so you can use it to settle customer account balances in-store or add store purchases to a customer's account balance. POS transactions automatically adjust your inventory levels so it's easy to keep track of your stock.

CARGAS ENERGY IMPLEMENTATION

12 WEEKS TO TOTAL TRANSFORMATION

It only takes 12 weeks to get up and running on Cargas Energy. A dedicated project manager and implementation consultant will guide you through the process, while our expert Technical Services team handles your data migration. The cost of your implementation and target go-live date are determined before you purchase Cargas Energy, so you know exactly what to expect up front.

OUR PROCESS

Kickoff. Your Cargas Project Manager will schedule a call to launch your implementation. We'll make introductions, review the process, and establish key roles, like your team's project manager.

Online training. Your team will work through our library of online training videos, then practice in a test site.

Setup. The Cargas team will guide you through server setup and manage all of your admin setup in Cargas Energy. You'll install any necessary hardware in your trucks.

Data migration and validation. You'll export all of your company and customer data from your legacy system and we'll import it into Cargas Energy. Your team will review the data in Cargas Energy to confirm everything transferred properly. You'll provide feedback, and we'll make adjustments.

On-site training. Your implementation consultant will hold training sessions for your team at your office.

Go-live. Once you complete month-end close in your legacy system, we'll do a final data migration to import your most recent info into Cargas Energy. Your implementation consultant will be on-site during go-live to support your team.

Transition to support. Your implementation consultant will provide support for your team for the first 4 weeks after go-live, until you've successfully completed your first month-end close using Cargas Energy. Then, they'll introduce you to your dedicated support consultant, who will receive all of your support tickets for the next 100 days.

CARGAS ENERGY IMPLEMENTATION
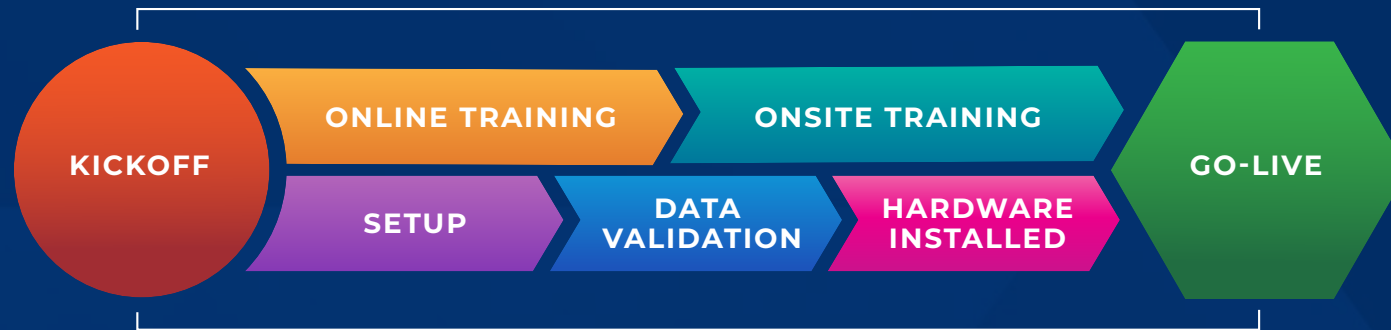
IMPLEMENTATION RESPONSIBILITIES

Cargas Handles

- System Setup
- Data Migration
- Data Revisions
- Training
- Go-Live Support
- First Month Support

You Handle

- Server Setup
- Data Export
- Data Validation
- Completion of Training Programs
- Hardware Installation

TIPS FOR A SUCCESSFUL IMPLEMENTATION

1. Form an in-house implementation team dedicated to working with Cargas

2. Appoint a project manager with the authority to lead the project

3. Take ownership of staff buy-in and set clear expectations for your team

4. Make sure your team completes all training programs

5. Take data validation seriously

6. Complete truck hardware installation as early as possible

7. Take advantage of the extra support resources available to you after go-live

CARGAS CARE PLAN

SUPPORT, UPGRADES & BEYOND

Your annual subscription to Cargas Energy is called the Cargas Care Plan and gives you access to all the support, upgrades, and resources you need to get the most out of your Cargas Energy investment. In addition, our Customer Experience team is specifically dedicated to your relationship with Cargas and ensuring you receive exceptional customer care.

RESOURCES FOR SUCCESS

Award-winning support. Our expert support team is available 7am–9pm ET to answer questions and resolve any issues you experience with Cargas Energy. Submit tickets through our online support portal or call our dedicated support hotline.

Upgrades and enhancements. We're continuously improving Cargas Energy, with new features released each year. Upgrades are scheduled for a time that's convenient for you and are managed remotely by our Deployment team so they don't impact your daily operations. Upgrades are first deployed in a test site so you can run through common activities and confirm everything is working properly before you make the change in your live site.

Online resources. The Cargas Energy Help Center is your one-stop-shop for help and information about Cargas Energy. In the Help Center, you can submit a support ticket or product suggestion. You can also access the Knowledge Base (which contains helpful articles and videos and the Cargas Connections forums (where you can chat with and ask questions of other Cargas Energy customers.

Cargas Energy Summit. In addition to the support and resources offered through the Cargas Care Plan, any Cargas Energy customer has the opportunity to attend our Summit, which brings together hundreds of customers, partners, and Cargas team members. This three-day event offers discussion panels, educational and training sessions, and social events to connect customers with one another and the Cargas team.

Customer Experience team. Our Customer Experience team was formed to ensure you experience the best customer care possible during your journey with Cargas.

Additional services. Our account management team is always available to discuss any needs you may have that fall outside of your Cargas Care Plan. They can provide information about extended services like software customizations and integrations, acquisitions, new modules, and ongoing training.

CARGAS ENERGY PRICING

WHAT CAN YOU EXPECT TO PAY?

The price for Cargas Energy is different for each customer depending on the number of users, number of trucks and service vans, modules activated, integrations or customizations, and the scope of implementation services. Once a member of our team reviews your business needs, we can give you a price estimate tailored for your organization. Our pricing is structured in three categories.

PRICING STRUCTURE

Software. Your System List Price is a one-time fee you will pay for each back office and mobile user who will have access to Cargas Energy's core modules. Depending on your needs, you may want to implement an advanced module, like Wholesale/Bulk Transport, or take advantage of one of our third-party integrations, like a customer web portal. Advanced modules and partner modules or integrations will add to your System List Price.

Hardware. You will pay a one-time fee for the hardware needed for each delivery truck and service van. This expense includes the cost of the tablet device, mounting hardware, Bluetooth® adapters, power cords and cables, and printers. Because pricing varies based on the cost of the tablet and mounting, we offer a variety of Android devices so you can choose the product that best suits your needs and budget.

Implementation services. You will work with a member of our team to define the scope of your implementation, which will determine the cost. Implementation is a one-time expense that includes project management, software installation and setup, data conversion, training for your team, integration and customizations, and go-live and post go-live support.

ADDITIONAL CONSIDERATIONS

Ongoing costs. After the initial implementation, your ongoing cost for Cargas Energy is covered under your Cargas Care Plan, which includes all support and upgrades. The Cargas Care Plan has an annual renewal of 27% of your System List Price (the total amount you paid for the software). Outside of Cargas Energy, you will have the monthly or annual fees associated with the partner routing software, your wireless service provider, and your cloud services provider.

Price management. If you are interested in financing, we partner with several vendors in the industry. We can also structure a phased implementation to reduce the cost of your initial investment. For example, you could start by implementing Cargas Energy's back-office software and Mobile Delivery application, then implement Mobile Service later, and Mobile Cylinder Exchange after that.

CARGAS CAPABILITIES

SUPPORT FOR YOUR GROWING BUSINESS

As your business grows and changes, you'll need additional resources for ongoing success. Whether you're preparing for an acquisition, need a custom feature, or are considering solutions for other areas of your business, Cargas offers unique capabilities to support your company now and in the future.

MORE THAN JUST OUR SOFTWARE

Continuous development. Our software needs to keep up with changes in the industry, technology, and your business. Our Product Development team is dedicated to continuously improving Cargas Energy to provide the capabilities you need for success. We are always creating new features based on your feedback and using the latest technology to offer the best product and experience for you.

Acquisition support. Managing acquisitions doesn't need to be a challenge. With the help of our Technical Services team, data migration is a streamlined process so you can get your new team up and running quickly. Cargas Energy is equipped to manage multiple divisions and locations with one system, so you don't need to keep the information from your new acquisition on a separate database.

Customization. Our technical consultants can help you get the most out of Cargas Energy and the other tools you use to run your business. Integrate solutions so you can easily share information across your company. Or take advantage of our custom development services to create reports or screens that are unique to your needs.

Additional expertise. Cargas is a leading provider of accounting, operations, and sales and marketing software from Microsoft, Sage, Salesforce, and HubSpot, and we also have an expert custom development team. As your business grows and changes, we can help you develop the new resources that you need.

"We can find the customer information we need—both past and current—just few mouse clicks away."

– Brent Edwards, Office Manager, Marshville Propane

YOUR JOURNEY

WHAT TO EXPECT WHEN PURCHASING SOFTWARE

Making a change to your back-office software is an incredibly important decision and not something you do often. If you're exploring options for a new solution, here's what you can expect from the process and some key questions to ask along the way.

THE BUYING PROCESS

Research. Before you start looking at software or talking to providers. it's important to understand your needs, your budget, and your expectations. Here are the top questions you should ask to guide your search for a new solution.

- What are the 3 biggest problems you're experiencing that you hope to solve with new back-office software?
- What 3 things do you want most in a new solution?
- What aspects of your business does the back-office software need to manage?
- What is your budget for the initial purchase? For ongoing costs and maintenance?
- What is your preferred implementation timeline?
- Do you need your back-office software to integrate with any other systems?
- What are the technical capabilities of your team?
- What are you looking for in your software provider?

Discovery. Now that you understand what you're looking for, you can start evaluating solutions. When you connect with a software provider, they'll want to spend some time getting to know you. Their goal is to understand your pain points and your budget to confirm their software is a good fit.

Demo. Once the provider knows their solution fits your needs and budget, they will offer a demo of the software so you can see it in action. The demo should be personalized to focus on the pain points you discussed during discovery. It's helpful to invite key users to the demonstration so they can ask questions specific to their roles and help you understand how the new software could improve or hinder operations.

Pricing. If you're serious about a solution, the provider will give you a detailed price estimate. While you may have discussed high-level pricing early in the process, this should be a final or near-final estimate of all your costs related to the purchase, including the software itself, implementation services, and hardware.

Purchase. The last step is to sign a proposal or contract with the provider finalizing your purchase of the software. The proposal will specify the purchase price, define the scope of the project, and outline who is responsible for the various steps.

YOUR JOURNEY

READY FOR THE NEXT STEP?

If you know what you're looking for and are ready to start talking to software providers, we'd love to hear from you. Our back-office software and mobile applications are helping fuel dealers across the country achieve better results faster and easier than ever before. We'd love to understand what's going on at your company and how Cargas Energy can support your success. For more information about Cargas and Cargas Energy, please visit cargasenergy.com or contact us to get started.

CARGAS®

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