

# CARGAS<sup>®</sup>

## CARGAS ENERGY | BUYER'S GUIDE

Purchasing new software is all about finding the best fit for your needs and your business. This guide will help you understand whether Cargas Energy is a good fit for you.



# CONTENTS

|                                     |       |
|-------------------------------------|-------|
| LET'S GET STARTED .....             | 1     |
| WHAT SETS CARGAS ENERGY APART ..... | 2-3   |
| FUEL DELIVERY .....                 | 4-5   |
| CUSTOMER SERVICE .....              | 6-7   |
| HVAC SERVICE .....                  | 8-9   |
| CYLINDER EXCHANGE .....             | 10-11 |
| INTEGRATED PAYMENT PROCESSING ..... | 12-13 |
| MYFUELPORTAL .....                  | 14-15 |
| EXTENDED FEATURES .....             | 16-17 |
| THE BUYING PROCESS .....            | 18    |
| CARGAS ENERGY IMPLEMENTATION .....  | 19-20 |
| CARGAS CARE PLAN .....              | 21    |
| CARGAS ENERGY SUMMIT .....          | 22    |
| CARGAS ENERGY PRICING .....         | 23    |
| CARGAS CAPABILITIES .....           | 24    |
| CASE STUDY .....                    | 25    |
| YOUR JOURNEY .....                  | 26    |



# LET'S GET STARTED

## YOUR COMPLETE GUIDE TO CARGAS ENERGY

Changing your fuel delivery software is an incredibly important decision. Before you make a switch, you want to know exactly what you're getting into. Is the software a good fit for your business? Will the provider be a good partner?

This guide will help you understand exactly what Cargas and Cargas Energy have to offer. You'll learn about:

- Our software and its features
- What to expect during sales and implementation
- The pricing structure
- Resources available to you as a Cargas Energy customer
- How we can support your entire business



# WHAT SETS CARGAS ENERGY APART

On the surface, the top fuel delivery solutions on the market look the same. But when you peek under the hood, you'll find that Cargas Energy's unique web-based platform and depth of functionality help it stand out.

**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.

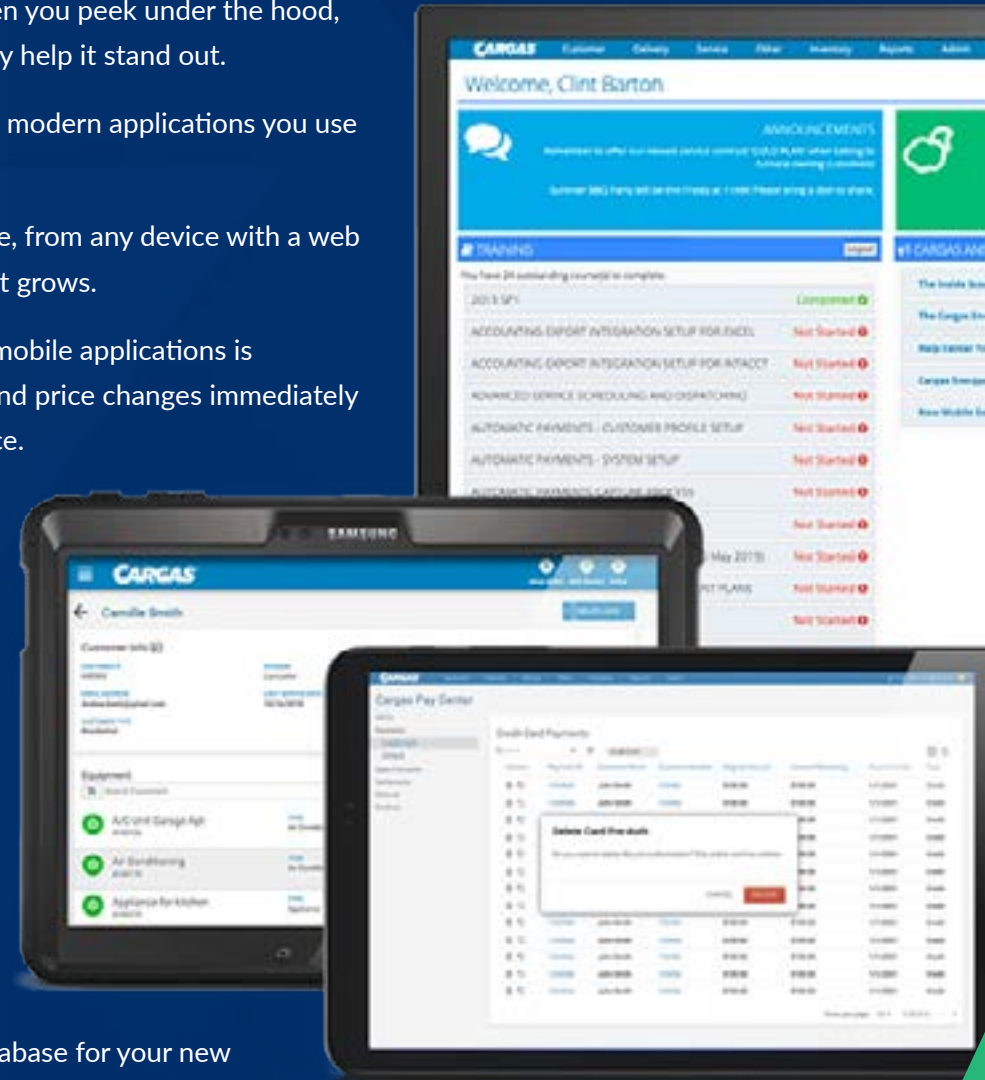
**Anytime access.** Cargas Energy is web-based, so you can access it anytime, anywhere, from any device with a web browser. And, it's designed to evolve and adopt the latest, most modern features as it grows.

**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.

**Integration capabilities.** Because Cargas Energy is a web-based solution, it's easy to integrate the software with other leading web-based solutions for CRM, accounting, tank monitoring, and more. We have a vast partner network with pre-built integrations to 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.

**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.



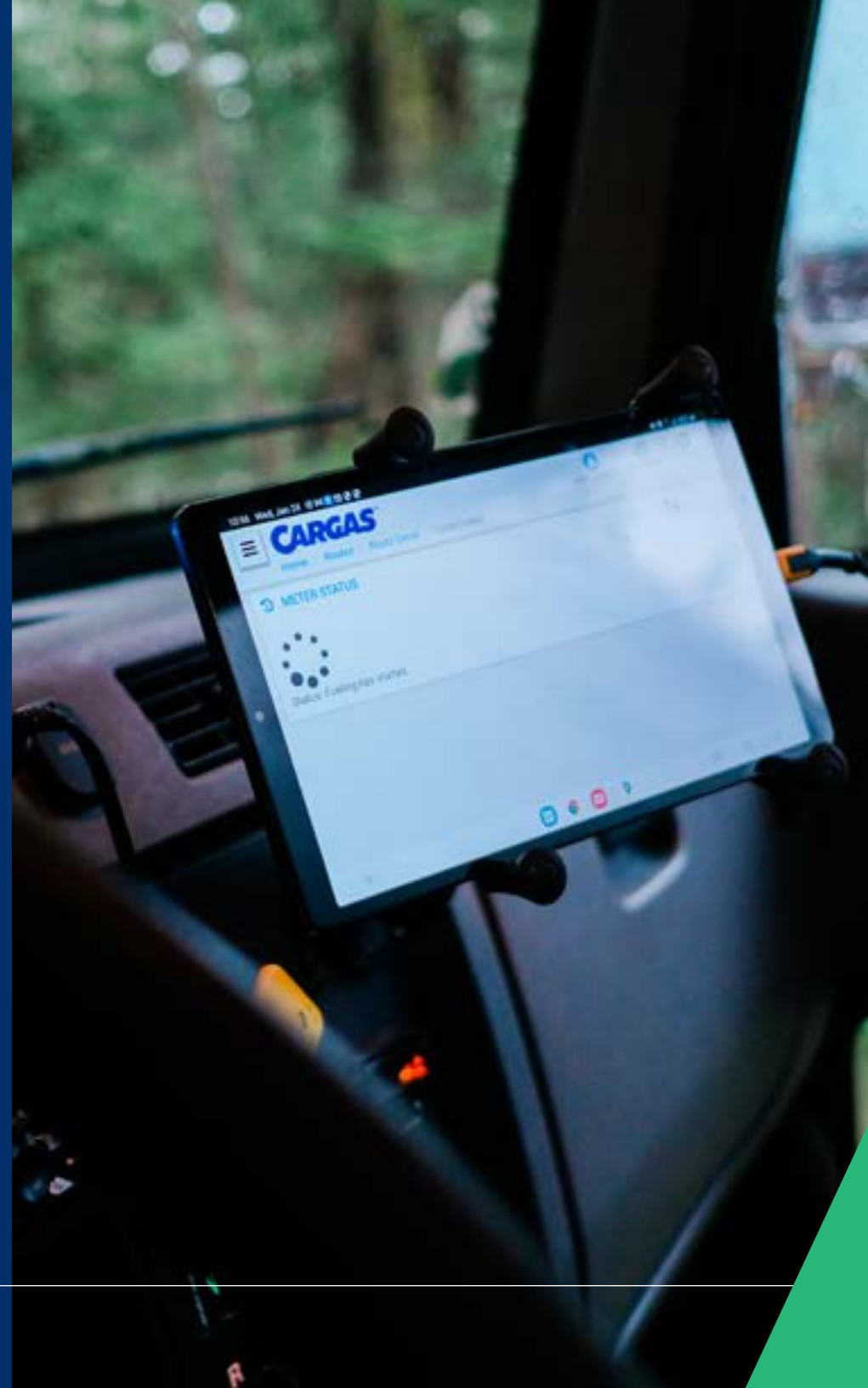
# WHAT SETS CARGAS ENERGY APART

**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.



*"I began to really put the numbers on paper, and I realized Cargas was not more expensive, and what they brought to the table was huge."*

—Kim Folger, Co-Owner, Folger Gas



# FUEL DELIVERY

## MORE GALLONS, FEWER MILES

Cargas Energy's fuel delivery module gives you tools to transform the way you deliver fuel. Whether you use tank monitors, deliver on a schedule, or automatically forecast customer usage, the Cargas Energy Delivery Center manages all your customers' tanks in one place. Our intuitive Route Builder helps dispatchers create complex routes with ease, while our real-time mobile technology lets you dispatch, monitor, and adjust your routes on the fly.



# 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 build multiple routes at once and locate the closest driver for an emergency stop.

**Route optimization.** Make deliveries efficient with route optimization that accounts for origin and destination points, live traffic, Hazmat and truck restrictions, and refueling and reloading stops.

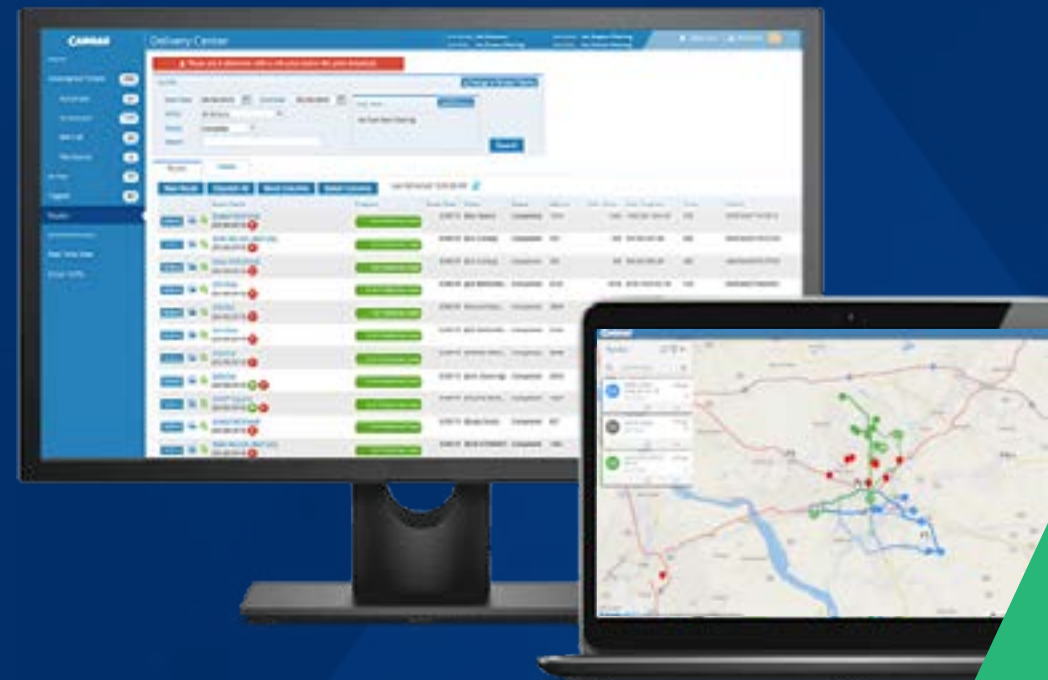
**Integrated tank monitor management.** Integrations with industry-leading tank monitoring systems allow you to see tank levels and historical readings right in Cargas Energy. This gives you instant access to accurate tank level data.

**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. Plus, drivers get turn-by-turn directions and can easily locate tanks with geolocation services.

**Ultimate flexibility.** The Delivery Center displays all outstanding tickets, regardless of type, giving you the ultimate flexibility to manage all deliveries in one hub.

## FEATURE HIGHLIGHTS

- Manage All Delivery Workflows in One Place
- Easily Identify At-Risk Tickets
- One-Click Dispatching & Posting
- Track Each Driver's Progress in Real Time
- Playback Shift History
- Print Shift Reports
- Multi-Route View
- Refueling & Reloading Stops





# 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, including 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.

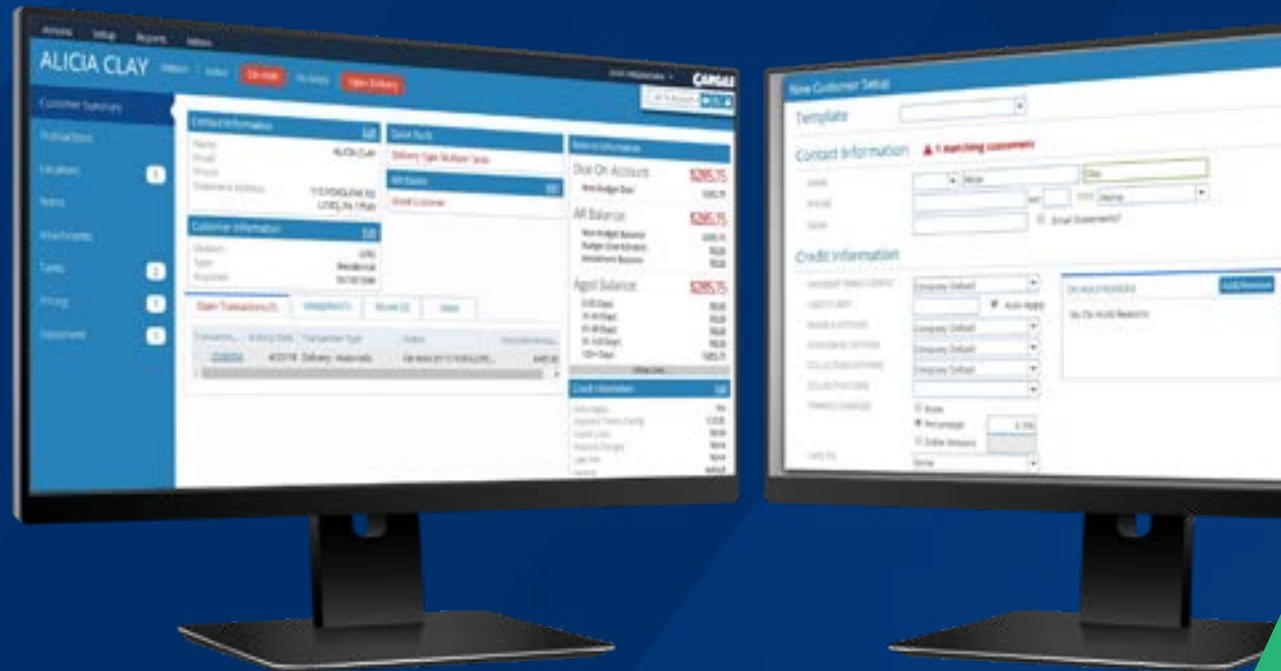
**Manage everything under one account.** There's no need to juggle multiple accounts for the same customer in Cargas Energy. Within one customer account, you'll find all their locations, tanks, fuel types, contracts, and other vital information.

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

**Text messaging.** Set up automated, personalized messages for your customers with Cargas Energy's texting capabilities. Establish triggers for specific messages, like delivery or service reminders, 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





# HVAC SERVICE

## SERVICE MANAGEMENT SIMPLIFIED

Cargas Energy's HVAC Service functionality streamlines service management so you can drive revenue with installations, maintenance, and more. The intuitive drag-and-drop dispatch board makes scheduling easy, while the mobile application lets you work with your technicians in real-time. With serialized inventory management features, 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.

**Service quoting.** Generate electronic quotes, automatically calculate pricing, add images and discounts, and easily send them to customers for review and approval.

**Custom Forms.** Build and attach custom service forms to work orders so technicians can complete documentation in the field using the Mobile Service app.

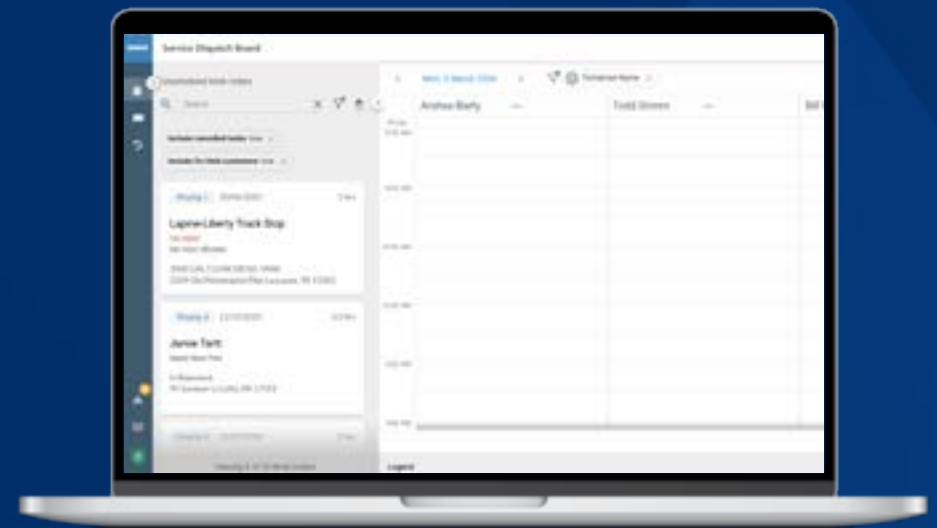
**Robust service contract capabilities.** Set up your service contract terms and let the software do the heavy lifting. It will tell you what parts are covered under specific contracts and calculate customer bills accordingly, and it will track each plan's profitability.

**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.

**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
- Quoting
- Serial Numbers
- Equipment Photos
- Automatic Parts Reordering
- Exhaustive Work Order History
- On-Site Signature Capture
- Custom Forms
- Service Contracts & Agreements
- Intelligent Zone Mapping



# 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. Then, 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.

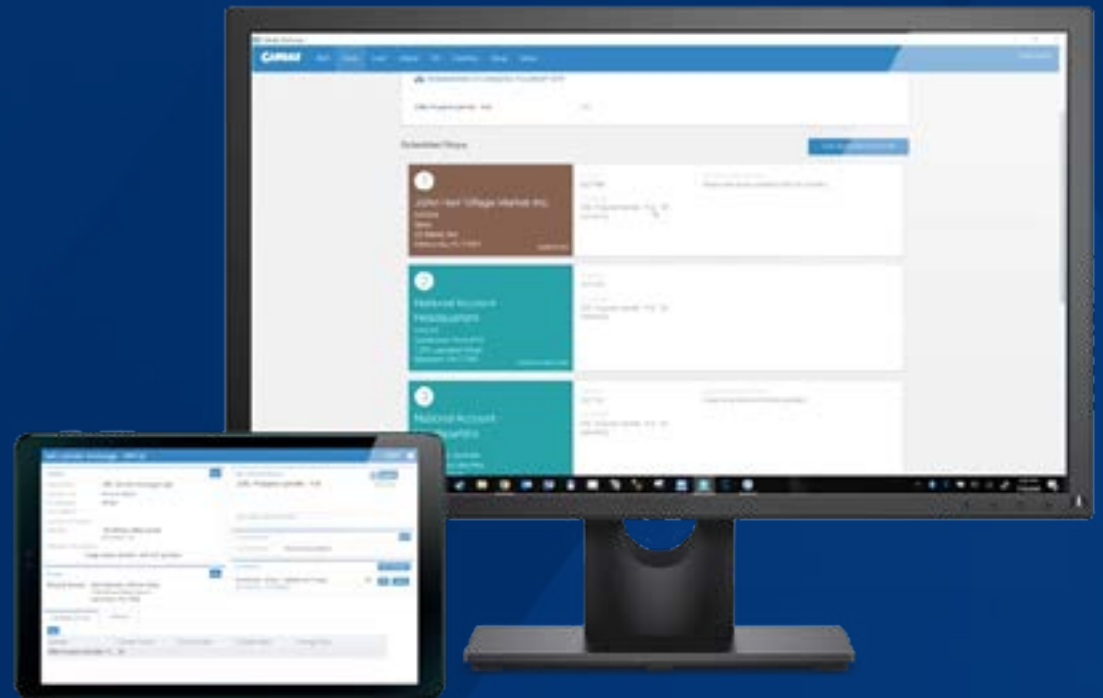
**All-in-one exchange management.** Our Cylinder Exchange Center has integrated routing so you can manage ticket pulls, routing, and dispatching from one place. Intuitive selection filters help you identify customers due for an exchange, or add will call tickets as needed.

**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 Workflows 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





# CARGAS PAY

## KEY BENEFITS

**A centralized experience.** Cargas Pay centralizes payments within Cargas Energy. See progress on settlements and review batches in your fuel delivery software instead of jumping between systems and working with external and third-party vendors.

**No hidden fees.** Enjoy better and more transparent pricing, with transaction fees visible directly in the software. Our simplified, blended rate offers competitive pricing and tells you exactly how much you're paying, with transaction fees visible directly in the software.

**Flexible payments.** Drivers and service techs can process payments in the field in real time by entering customer information or charging a card that's on file.

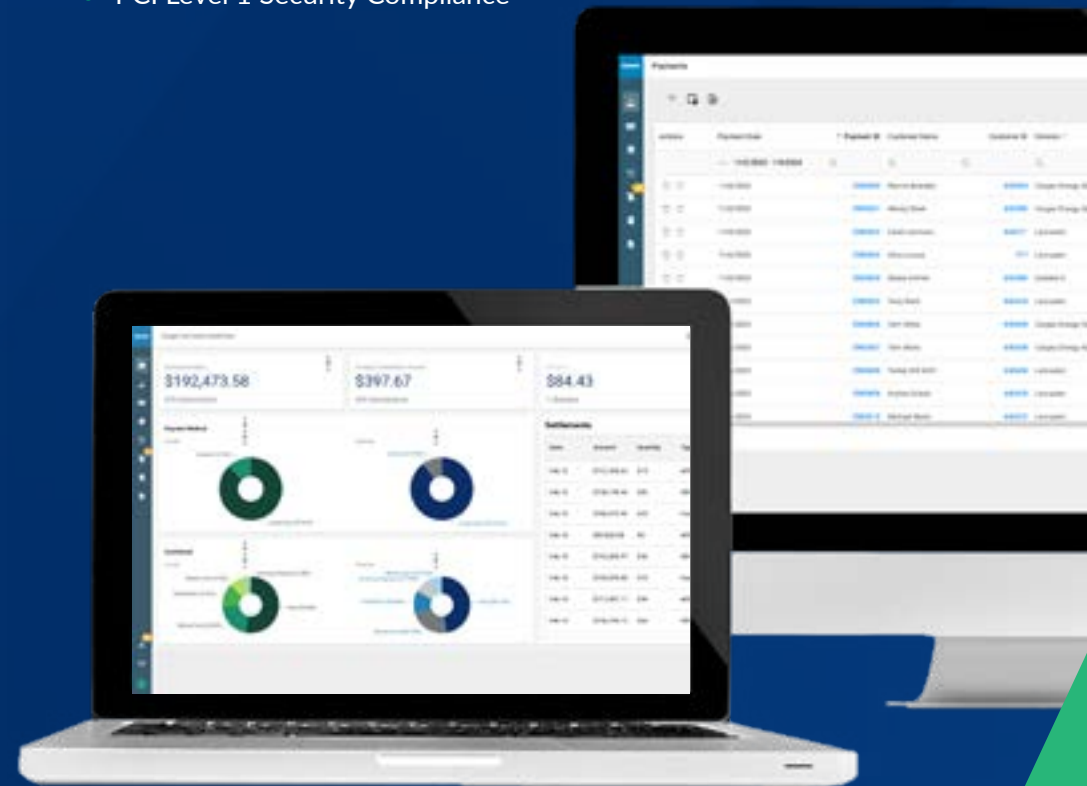
**POS integration.** Cargas Pay works seamlessly with the Point of Sale application to offer credit card swiping at storefronts.

**Reports and dashboards.** See any payment status at a glance in the intelligent payment dashboard. Or, run reports on your payment data right in Cargas Energy.

**Surcharging.** Recoup the processing costs of credit card payments made through Cargas Pay. Add surcharges to automatic payments and have peace of mind with our adherence to card network and state law requirements.

## FEATURE HIGHLIGHTS

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





# MYFUELPORTAL

## CARGAS ENERGY'S CUSTOMER PORTAL

Reduce your workload and increase cash flow by giving customers the ability to check their accounts, make payments, and request deliveries or service online. With MyFuelPortal, you give customers the convenience of 24/7 service without overwhelming your team.

# MYFUELPORTAL

## KEY BENEFITS

**Instant account setup.** Walk new customers through all the steps needed to create MyFuelPortal and Cargas Energy accounts and capture basic information.

**Reduce workload.** Empower customers to make payments, request deliveries, schedule service, and enroll in programs without ever calling the office.

**Increase cash flow.** Easily manage revenue-generating programs like autopay, budget plans, service agreements, and pricing promotions.

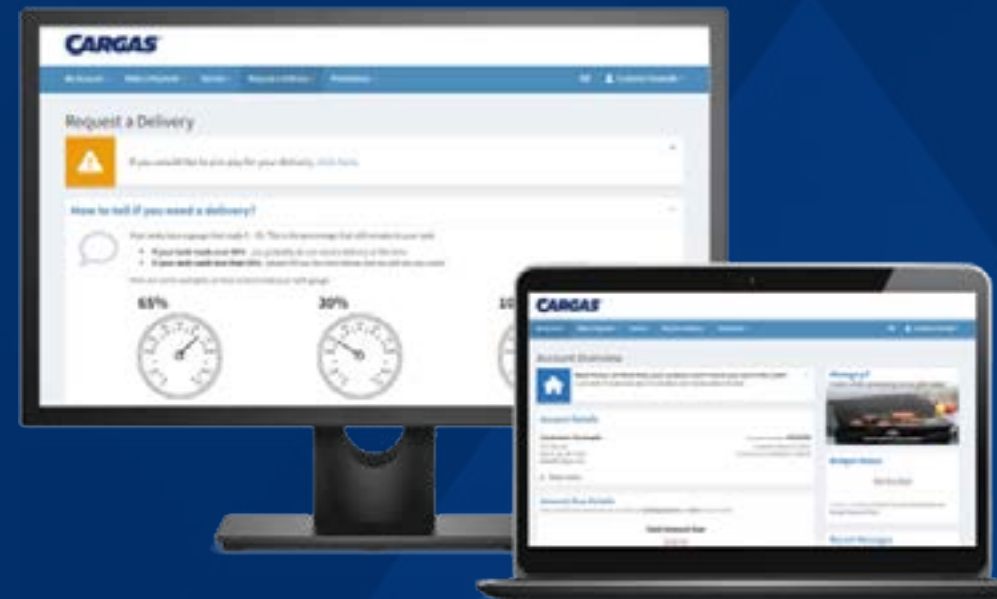
**Promote your business.** Win business from your customers using banner ads and targeted content to promote your products, services, and offers.

**Communicate consistently.** Use text and email notifications, pop-ups, and one- or two-way messaging to stay in touch with customers.

**Work your way.** Design MyFuelPortal to match the way you do business. Customize everything from logos and colors to modules and menus.

## FEATURE HIGHLIGHTS

- Customer Account Management
- Delivery & Service Requests
- Autopay & Pricing Promotions
- Email, Text & Portal Notifications
- Built-In Reports & Dashboards
- Customizable Settings
- Mobile Application
- Automatic Sync with Cargas Energy





# 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

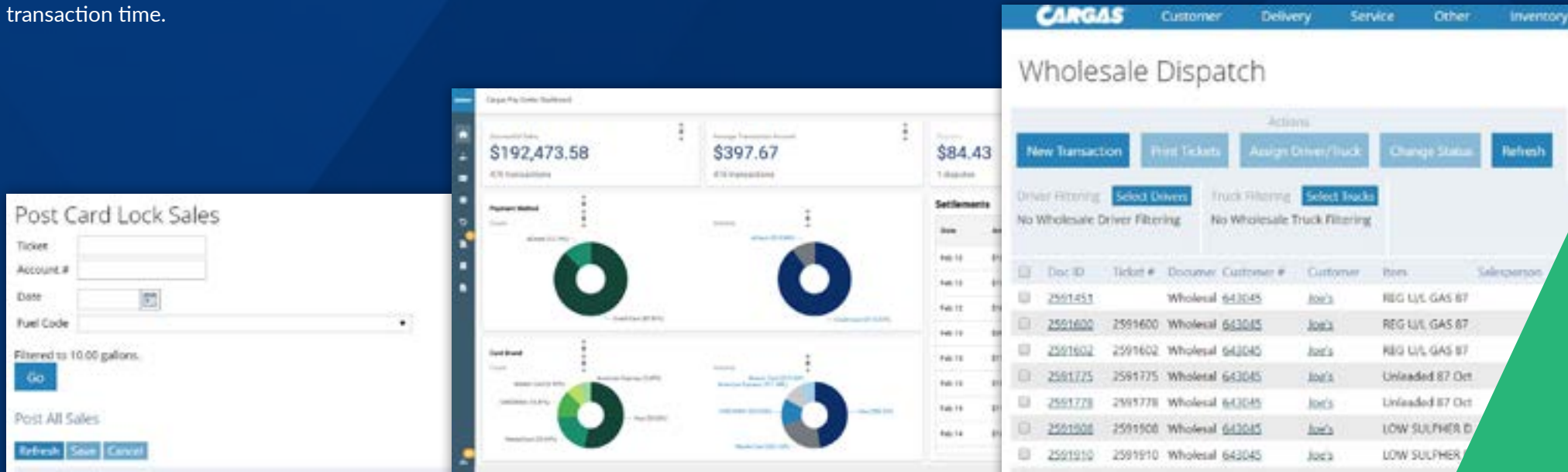
**Wholesale delivery.** Cargas Energy offers a dedicated wholesale board to track incomplete wholesale transactions. Your margin on each wholesale ticket is automatically recorded so you can track fuel costs from the point of origin all the way to your end customers. See a list of available suppliers 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.** Our pre-built dashboards give you a visual way to measure the metrics that matter to your company's success. Plus, 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.

**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 your 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.



# THE BUYING PROCESS

## WHAT TO EXPECT WHEN PURCHASING SOFTWARE

When you need new software, it's important to move through the selection process carefully. Here are some resources to help you get started and understand what it's like to work with Cargas.

### BEFORE YOU START, ASK YOURSELF

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

### OUR PROCESS

**Discovery.** We'll hold a discovery session to learn about your needs, requirements, timeline, and vision for the future. This helps us identify your key success criteria so we can develop a demo plan and recommend a solution for your business.

**Demo.** We'll deliver a completely personalized demo that addresses your specific needs and requirements based on your demo plan.

**Project estimate review.** During this working session, we'll finalize your Cargas Energy solution, including licensing and services. We'll also provide a high-level overview of the implementation process.

**Agreement.** Once your team and our team are satisfied with the Project Estimate Review, all we need is your signature on the proposal to kick off your project!

**Kickoff.** Welcome to the Cargas family! Now that you've signed the proposal, it's time to meet your team. You'll be assigned a dedicated project manager who will guide you through the next steps in the process and oversee your implementation. Congrats!

# 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.

## IMPLEMENTATION RESPONSIBILITIES



### Cargas Handles

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



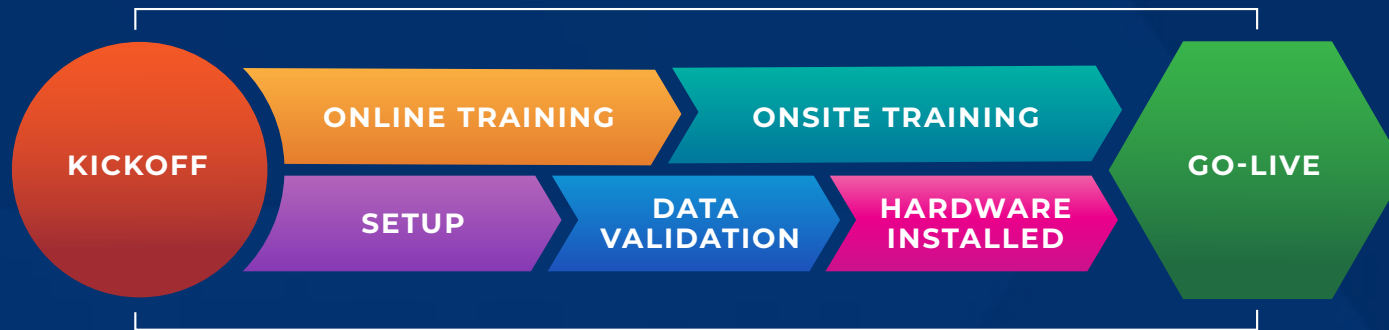
### You Handle

- Server Setup
- Data Export
- Data Validation
- Completion of Training Programs
- Hardware Installation
- Testing & User Practice

## 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 ENERGY IMPLEMENTATION



## 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.

**Training.** Your implementation consultant will hold training sessions for your team. Training can be completed remotely, but our team is available for on-site training upon request.

**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 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. Additionally, 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 Support and Customer Experience teams are specifically dedicated to your relationship with Cargas and ensuring you receive exceptional customer care. Our expert support team is available 7am–7pm ET to answer questions and resolve any issues you experience with Cargas Energy. You can submit tickets through our online support portal or chat directly with one of our support consultants. In addition, we have a dedicated support hotline for driver and system emergencies.

**Upgrades and enhancements.** We're continuously improving Cargas Energy, with new features released each year. 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. Updates are scheduled for a date that's convenient for you and are managed after hours by our Deployment team to ensure no disruptions to your daily operations.



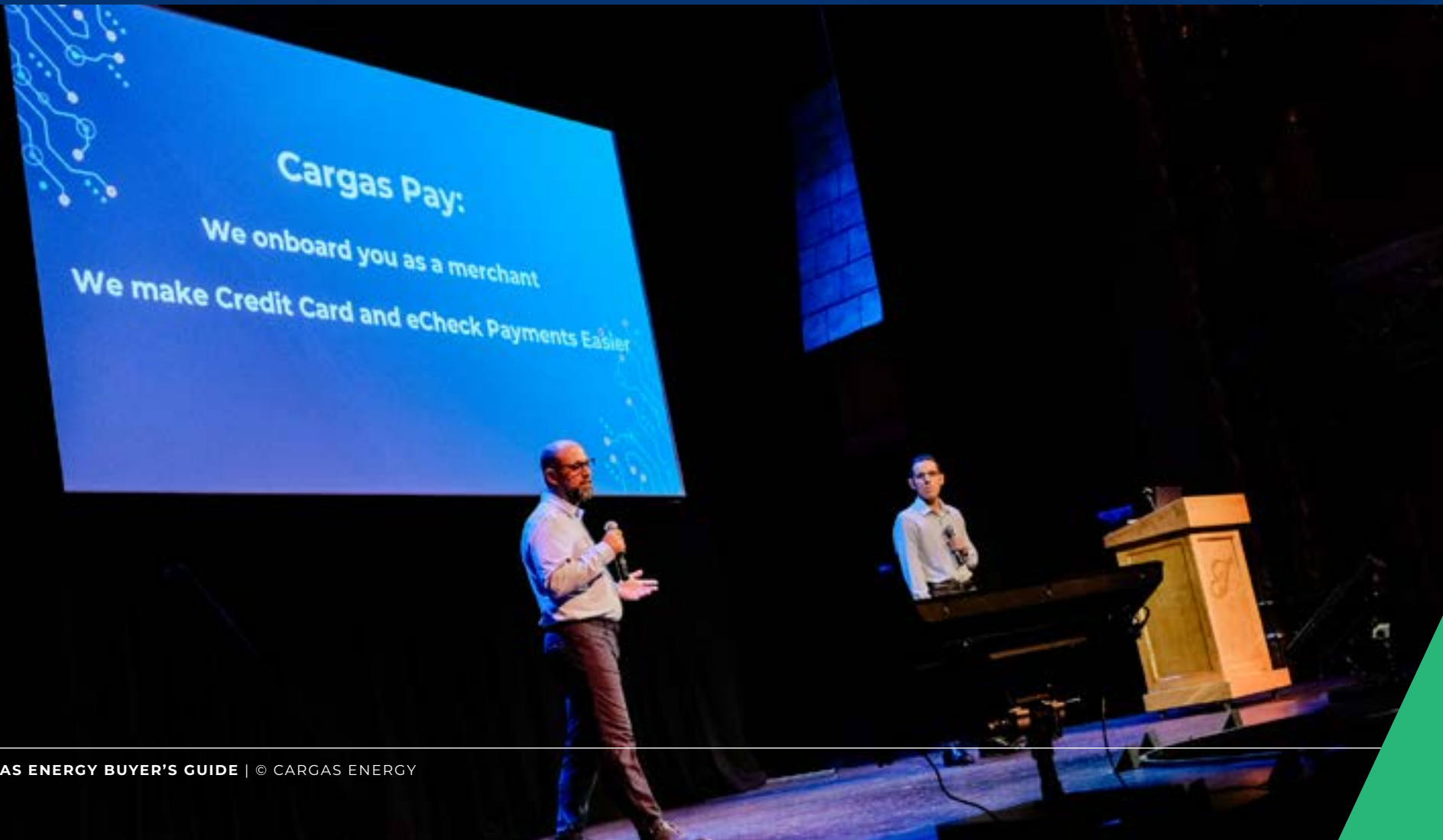
**Online resources.** The Cargas Energy Help Center is your one-stop-shop for help and information about Cargas Energy. In the Help Center, you can submit a support ticket or product suggestion. You can also access the Knowledge Base (which contains helpful articles and videos) and the Cargas Connections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

**Additional services.** Our Customer Experience team was formed to ensure you experience the best customer care possible during your journey with Cargas. Alongside our Account Management team, the Customer Experience team is equipped to discuss any needs you may have, regardless of whether they fall within the scope of your Cargas Care Plan. These teams can provide information about extended services like software customizations and integrations, acquisitions, new modules, and ongoing training.

# CARGAS ENERGY SUMMIT

## JOIN OUR GROWING COMMUNITY

In addition to the support and resources offered through the Cargas Care Plan, any Cargas Energy customer can attend our Summit, which brings together hundreds of customers, partners, and Cargas team members. This multi-day event is held every two years, offering discussion panels, educational and training sessions, and social events to connect customers with one another and the Cargas team.



# 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, required hardware, 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 tank monitor. 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 Acumatica, HubSpot, Microsoft, Sage, and Salesforce. Our team of experts can partner with you to manage your technology across your entire business.



*"I immediately noticed the efficiencies in building routes. The communication between the tablets and the office is seamless."*

– Chris Stanley, Vice President and Office Manager, Euliss Propane

# CASE STUDY

## DELIVERING PROPANE BY LAND & SEA

Starting a business is hard. Starting a business to deliver propane across numerous islands while adjusting to a new partnership? Now that's one wild ride. Driven by their love for their neighbors in the San Juan Islands, Jimmy Lawson and Donny Galt established Inter-Island Propane to serve a community in dire need of a local propane business. Hear how Jimmy and Donny overcome angry tides and unpredictable weather every day to make sure their community gets the propane they need—even if it means crossing land and sea.



# 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](http://cargasenergy.com) or contact us to get started.

The logo for Cargas Energy, featuring the word "CARGAS" in a bold, white, sans-serif font with a registered trademark symbol (®) to the upper right of the letter "S".

**CARGAS**®

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