

## DM2 Software's *Petroleum Insights* CreditAlerts Module

### DM2's CreditAlerts Features:

#### CreditAlerts Processes

- Order Entry
- Order Printing
- Order Release
- Invoice Entry
- Cash Receipts Entry
- Cardlock Daily Processing

#### CreditAlerts Conditions

- On Hold
- Past Due Balance
- Over Credit Limit

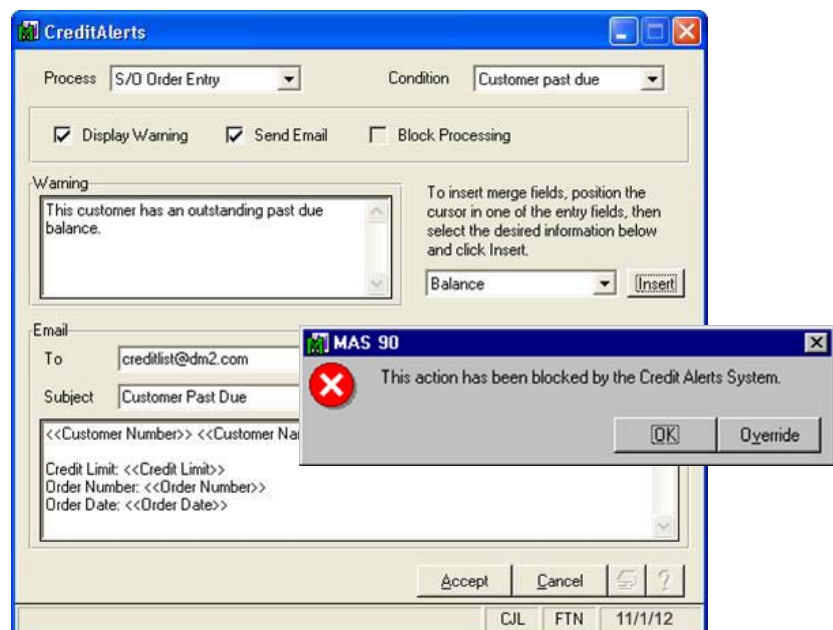
#### CreditAlerts Actions

- Display Warning
- Send Email Notification
- Block Processing

Slow payment, high receivables and the costs of debt collection can easily offset narrow margins and in many case have a significant impact on your bottom line. In this tough economic climate, survival can depend on how effective you manage your credit and collections.

DM2 CreditAlerts™ extends the existing credit management tools built into your *Petroleum Insights* system. It provides both hard rule (transaction blocking) and soft rule (notification and alerts) to enforce your credit policies. This means you are not just told about credit conditions - you actually have a system in place to prevent an order or delivery from being processed until your customers' credit issues are resolved. CreditAlerts runs in the background during normal transaction processing, assessing your customers' credit status and carry out the credit actions you specify.

CreditAlerts enforces your credit policies three ways - Processes, Conditions, and Actions. Processes are the points in your transaction flow where you want CreditAlerts to become active. Conditions reflect your customers' current credit status based on their Accounts Receivable balances, including any of the orders you are currently processing. Actions are the steps you direct CreditAlerts to take when those Conditions are met.



# DM2 Software's CreditAlerts Module



## Manage by Exception

Manage by *exception* instead of watching every transaction. CreditAlerts automatically checks for and responds to credit conditions and alerts you to potential credit issues via on-screen pop-up notifications and e-mail alerts to give you visibility on your workstations, Smartphone, tablet or wherever you access your e-mail.

## Improve Credit Management

Apply credit checks and enforce your credit policies without changing your operator's workflow or retraining your staff. Easily determine who's credit limit is too high or too low so you can right size your customers' credit limits.

## Reduce Bad Debt

Reduce bad debt by preventing orders from being processed that you can't collect on. Identify good and bad credit risks so you can focus on growing your business instead of your credit exposure. Be more proactive with collection calls.

## ABOUT DM2

Since 1989, DM2 has been developing software and working to help diversified petroleum marketers to increase market share and improve profitability through automation. DM2, a Sage Software Master Developer and Reseller since 1991, uses Sage 100 ERP (formerly Sage ERP MAS 90 and 200) and Sage CRM, ERP (enterprise resource planning) and CRM (customer relationship management) systems designed for general wholesale distribution applications, to develop, sell and support *Petroleum Insights*, a fully integrated accounting/ERP and CRM system designed specifically for petroleum marketers. DM2's *Petroleum Insights* system offers all of the core financials, fuel, lubricants, home heat/propane, cardlock, c-store, supply chain automation, advanced business analytics, customer relationship management, fixed assets, paperless office and eCommerce modules petroleum marketers need to manage and grow their businesses. DM2 is a proud member of the Sage Software President's Circle and has ranked as a Top 10 Sage 100 ERP reseller since 1999.

For information on DM2 Software products and services, e-mail, [sales@dm2.com](mailto:sales@dm2.com), call (800) 866-5151, or visit the DM2 Software website at [www.dm2.com](http://www.dm2.com).

## AVAILABILITY:

***Petroleum Insights*  
Versions 4.30 or later**

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