

Equipment Manager Webinar

June 13, 2013

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DM²
software, inc.

*Equipment Manager
Connections Webinar – June 13, 2013*

Agenda

- Do you know
- What does Equipment Manager do
- Reporting
- Things to consider
- Questions

Do You Know?

Or maybe the better question is, do you know
what you don't know?

Do You Know?

- Where your equipment is?

Do You Know?

- Where your equipment is?
- If your customers are meeting their agreements?

Do You Know?

- Where your equipment is?
- If your customers are meeting their agreements?
- If your customers are using your equipment but are buying the fuel or lubes from someone else?

Do You Know?

- Where your equipment is?
- If your customers are meeting their agreements?
- If your customers are using your equipment but are buying the fuel or lubes from someone else?
- Where your equipment has been, how many gallons have gone thru it and when it has been serviced?

Do You Want?

- A document outlining the details of the agreement?
- The ROI on your loaned equipment?

What Does Equipment Manger Do?

Or how can it help you find out the things you
don't know?

What Does Equipment Manager Do?

- Tracks your equipment, their cost, the thru put, sales dollars
- Tracks the agreements with your customers, where the equipment is located, what products are being purchased and how much
- As you keep up with this within Equipment Manager, you will have a record by the equipment and by the agreement

What Does Equipment Manger Do?

- With the AP Invoice Interface, you can streamline your data entry and add new equipment from AP

A/P Invoice Data Entry (BAS) 03/15/2013

Vendor No. 0000004 Batch 00002 Vendor...

Name Tank Equipment, Inc

Invoice No. 456

1. Header | 2. Lines

Invoice Date 03/15/2013

Invoice Amount 15,000.00

Subject to Discount 15,000.00

Prepaid Invoice

Terms Code 10 Net 10 Days

Invoice Due Date 03/25/2013

Discount Due Date

Discount Amount .00

BOL...

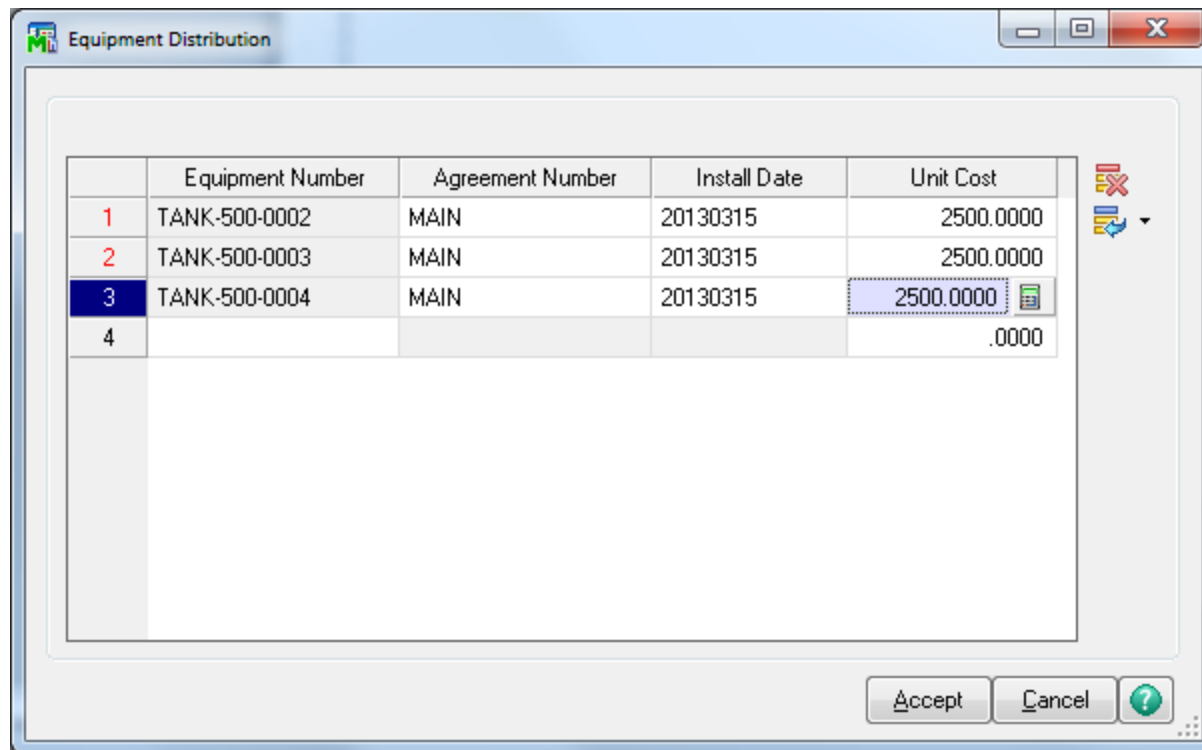
Freight...

Equipment...

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What Does Equipment Manger Do?



The screenshot shows a software window titled "Equipment Distribution". Inside the window is a table with the following data:

	Equipment Number	Agreement Number	Install Date	Unit Cost
1	TANK-500-0002	MAIN	20130315	2500.0000
2	TANK-500-0003	MAIN	20130315	2500.0000
3	TANK-500-0004	MAIN	20130315	2500.0000
4				.0000

The table has a header row and four data rows. The third row is highlighted in blue. To the right of the table, there are icons for adding, deleting, and refreshing data. At the bottom of the window, there are buttons for "Accept", "Cancel", and a help icon.

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What Does Equipment Manger Do?

Serialized Equipment Maintenance (BAS) 06/13/2013

Equipment No. TANK-500-0002

Description 500 Gal Tank

1. Main | 2. Transactions

Vendor Number 0000004 Tank Equipment, Inc

Vendor Serial No 1

Vendor Serial No 2

Equipment Type TANK500 500 Gal Tank

Purchase Date 03/15/2013

Next Inspection Date 09/15/2013

Anniversary Date 03/15/2014

Manufacture Date 03/01/2013

Service Date

SIC Code

Capacity .00

Purchase Cost 2,500.000000

PTD Units .00

YTD Units .00

LTD Units .00

Note

Accept Cancel Delete Print Help

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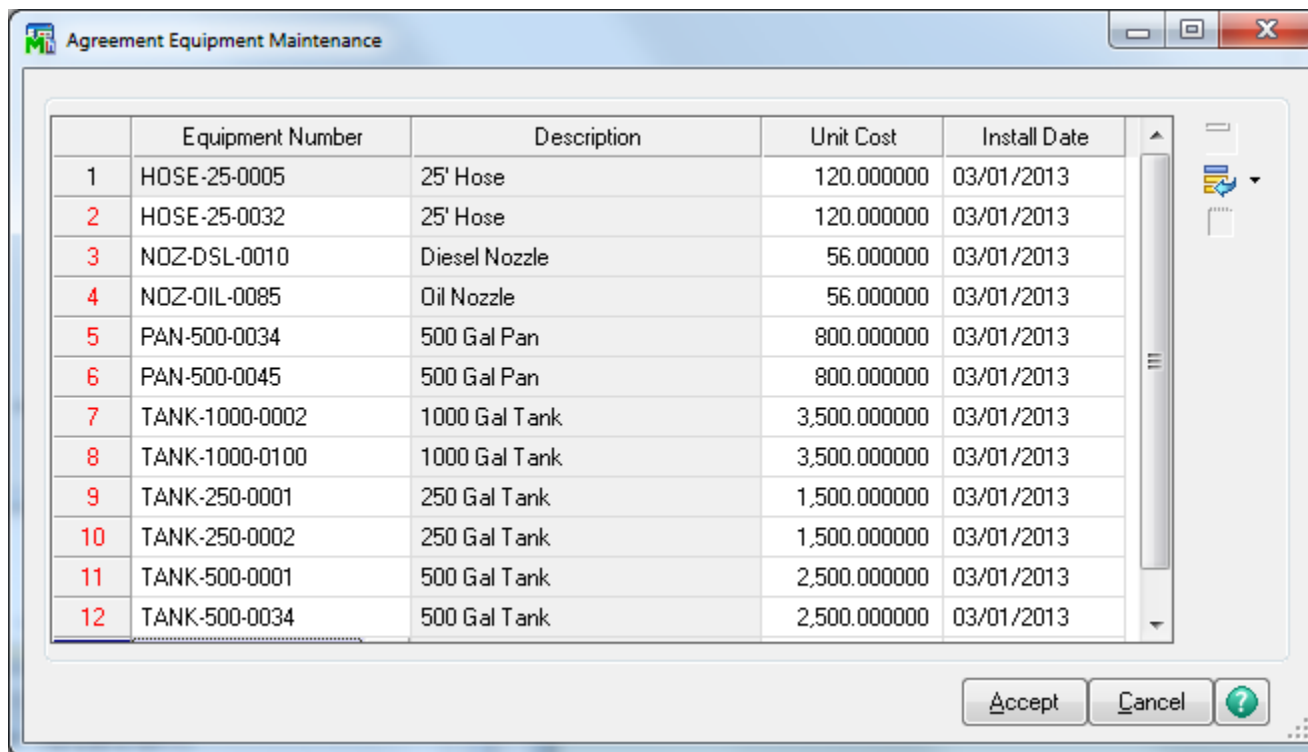
What Does Equipment Manger Do?

- Track what you have in the yard, ready to be placed.

The screenshot displays the 'Agreement Maintenance (BAS) 06/10/2013' window. The form contains the following fields and controls:

- Agreement No.: MAIN
- Description: EQUIPMENT AT THE MAIN WAREHOUSE
- Product...: Equipment...
- Navigation: 1. Main | 2. Additional | 3. Transactions
- Agreement Date: 03/01/2013
- Status: Active
- Expiration Date: 06/10/2013
- Customer No.: 9999999
- MAIN WAREHOUSE
- Ship To Addr: [Empty]
- Salesperson: 0001 Default Salesman
- Cancelled / Closed Date: [Empty]
- Document: None
- Print Agreement: [Button]
- Expected Sales Volume: 0.0
- Maintenance Cost: .00
- Expected Quantity Volume: 0.0
- Penalty Rate: 0.0000
- Buttons: Accept, Cancel, Delete, [Print], [Help]

What Does Equipment Manger Do?



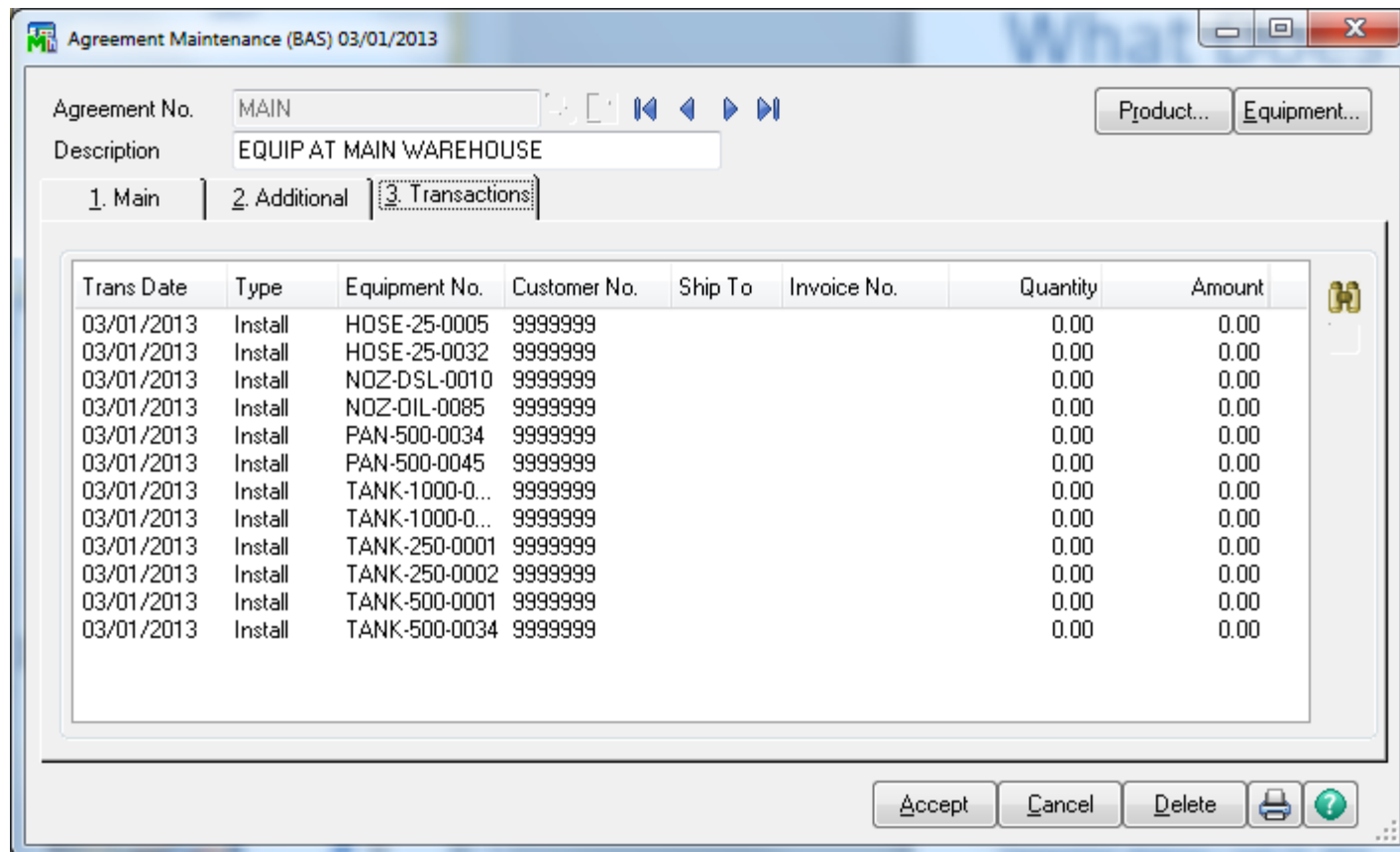
The screenshot shows a software window titled "Agreement Equipment Maintenance". It contains a table with 12 rows of equipment data. The columns are "Equipment Number", "Description", "Unit Cost", and "Install Date". The "Equipment Number" column has red numbers 1 through 12. The "Unit Cost" column shows values like 120.000000, 56.000000, 800.000000, 3,500.000000, and 2,500.000000. The "Install Date" column shows "03/01/2013" for all items. At the bottom right of the window are "Accept", "Cancel", and a help icon.

	Equipment Number	Description	Unit Cost	Install Date
1	HOSE-25-0005	25' Hose	120.000000	03/01/2013
2	HOSE-25-0032	25' Hose	120.000000	03/01/2013
3	NOZ-DSL-0010	Diesel Nozzle	56.000000	03/01/2013
4	NOZ-OIL-0085	Oil Nozzle	56.000000	03/01/2013
5	PAN-500-0034	500 Gal Pan	800.000000	03/01/2013
6	PAN-500-0045	500 Gal Pan	800.000000	03/01/2013
7	TANK-1000-0002	1000 Gal Tank	3,500.000000	03/01/2013
8	TANK-1000-0100	1000 Gal Tank	3,500.000000	03/01/2013
9	TANK-250-0001	250 Gal Tank	1,500.000000	03/01/2013
10	TANK-250-0002	250 Gal Tank	1,500.000000	03/01/2013
11	TANK-500-0001	500 Gal Tank	2,500.000000	03/01/2013
12	TANK-500-0034	500 Gal Tank	2,500.000000	03/01/2013

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What Does Equipment Manger Do?



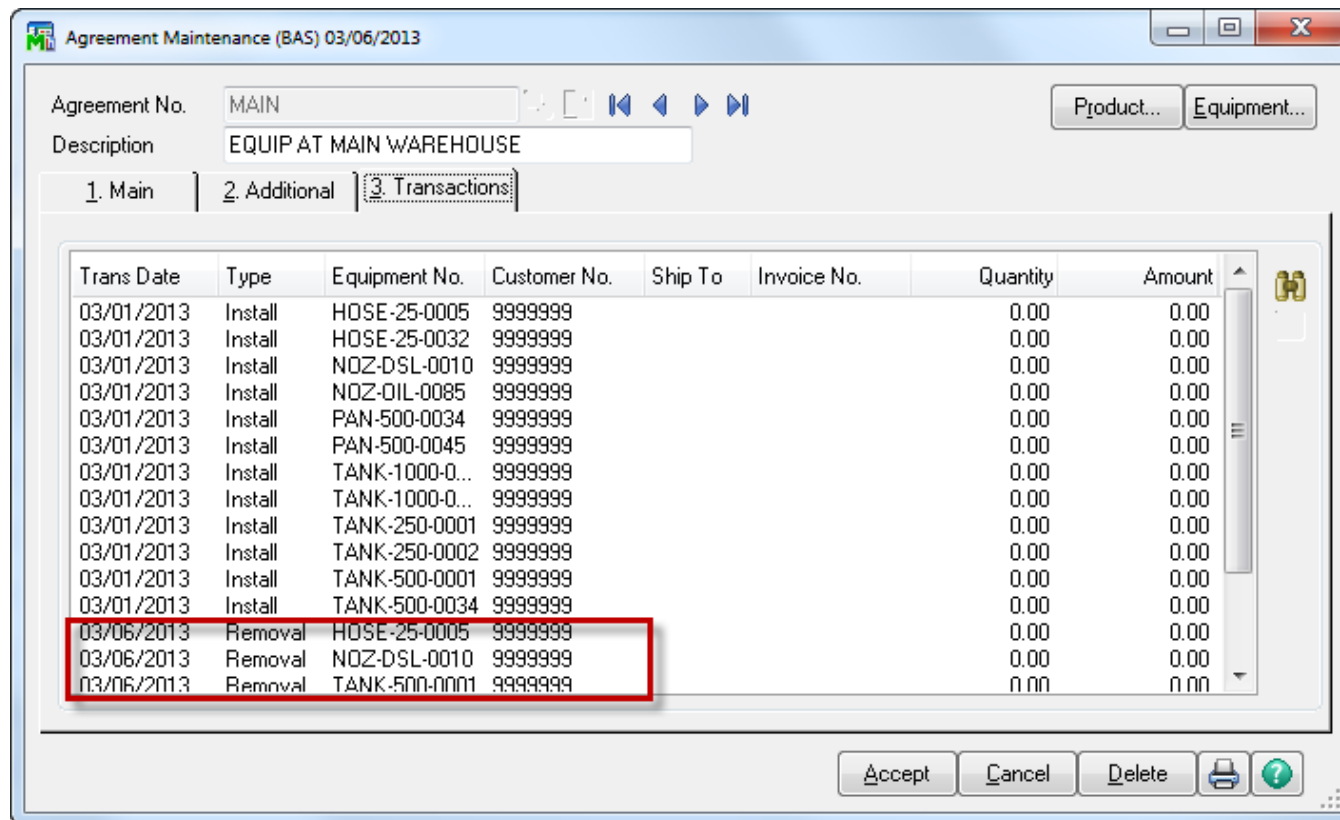
The screenshot shows the 'Agreement Maintenance (BAS) 03/01/2013' window. The 'Agreement No.' is 'MAIN' and the 'Description' is 'EQUIP AT MAIN WAREHOUSE'. The '3. Transactions' tab is selected, displaying a table of equipment transactions.

Trans Date	Type	Equipment No.	Customer No.	Ship To	Invoice No.	Quantity	Amount
03/01/2013	Install	HOSE-25-0005	9999999			0.00	0.00
03/01/2013	Install	HOSE-25-0032	9999999			0.00	0.00
03/01/2013	Install	NOZ-DSL-0010	9999999			0.00	0.00
03/01/2013	Install	NOZ-OIL-0085	9999999			0.00	0.00
03/01/2013	Install	PAN-500-0034	9999999			0.00	0.00
03/01/2013	Install	PAN-500-0045	9999999			0.00	0.00
03/01/2013	Install	TANK-1000-0...	9999999			0.00	0.00
03/01/2013	Install	TANK-1000-0...	9999999			0.00	0.00
03/01/2013	Install	TANK-250-0001	9999999			0.00	0.00
03/01/2013	Install	TANK-250-0002	9999999			0.00	0.00
03/01/2013	Install	TANK-500-0001	9999999			0.00	0.00
03/01/2013	Install	TANK-500-0034	9999999			0.00	0.00

What Does Equipment Manger Do?

- Track your equipment when it leaves the yard
 - Remove it from the Yard agreement
 - Add it to your customer's agreement
 - Both agreements will track it as will the equipment itself

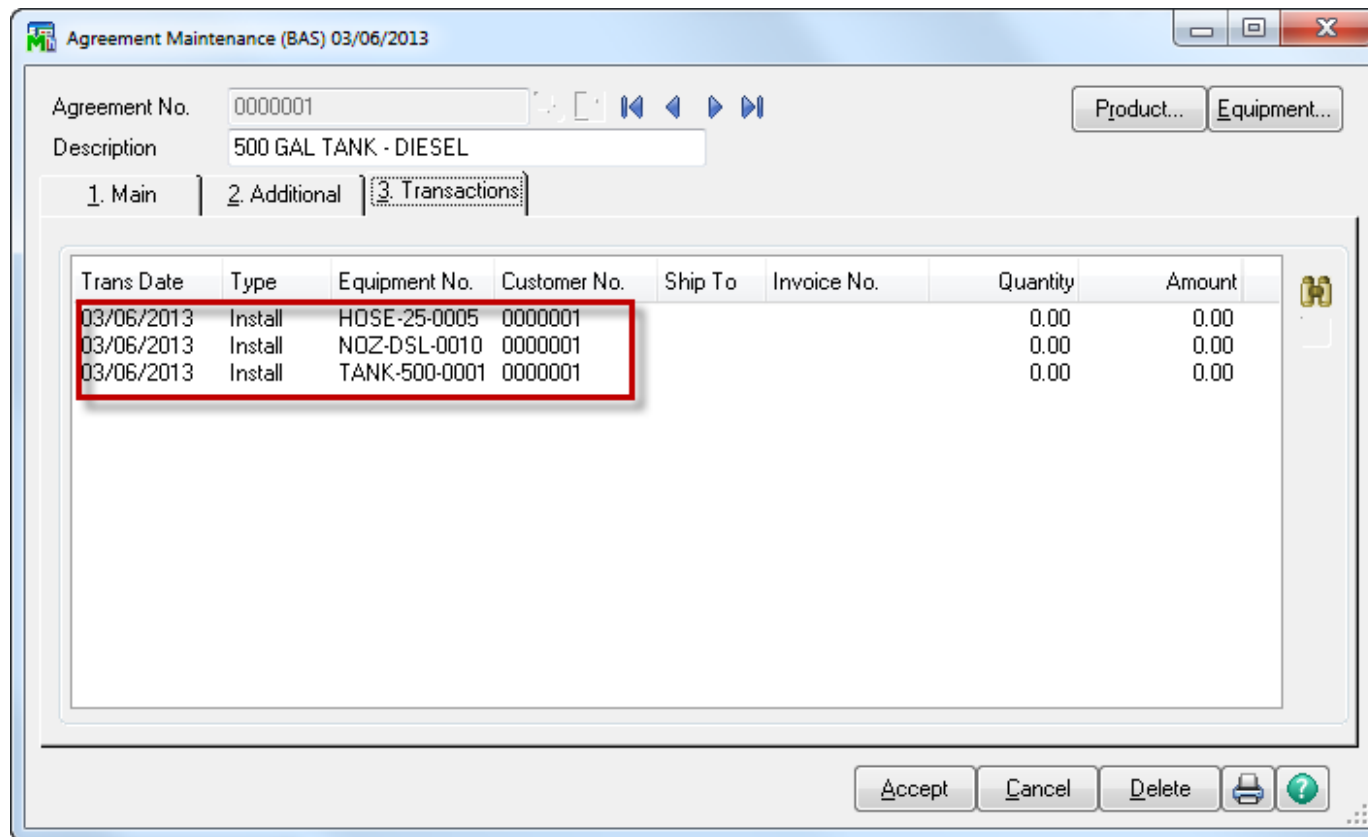
What Does Equipment Manger Do?



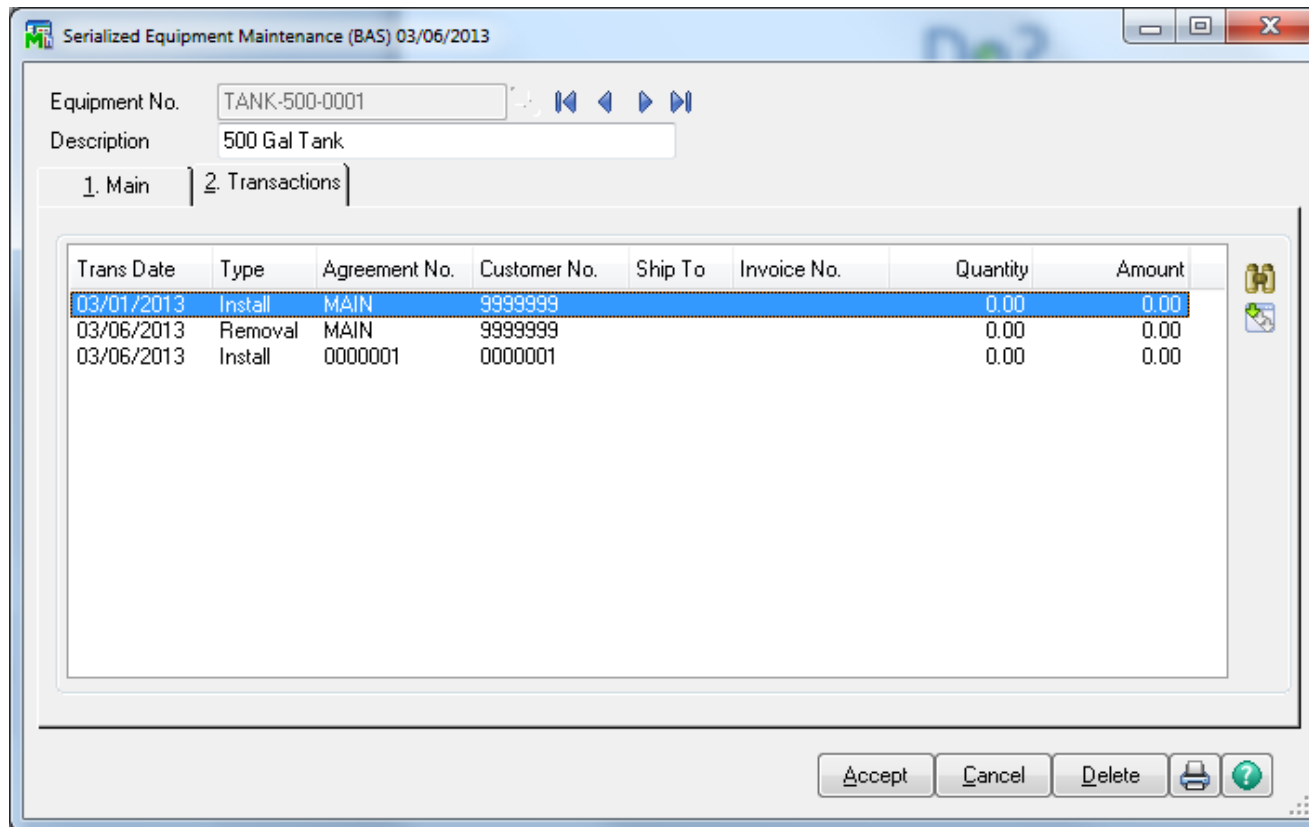
The screenshot shows a software window titled "Agreement Maintenance (BAS) 03/06/2013". It features a header section with "Agreement No." set to "MAIN" and "Description" set to "EQUIP AT MAIN WAREHOUSE". Below this are tabs for "1. Main", "2. Additional", and "3. Transactions", with the third tab selected. A table lists various transactions, including installations and removals. The last three rows, representing removals on 03/06/2013, are highlighted with a red box. At the bottom of the window are buttons for "Accept", "Cancel", "Delete", and a help icon.

Trans Date	Type	Equipment No.	Customer No.	Ship To	Invoice No.	Quantity	Amount
03/01/2013	Install	HOSE-25-0005	9999999			0.00	0.00
03/01/2013	Install	HOSE-25-0032	9999999			0.00	0.00
03/01/2013	Install	NOZ-DSL-0010	9999999			0.00	0.00
03/01/2013	Install	NOZ-OIL-0085	9999999			0.00	0.00
03/01/2013	Install	PAN-500-0034	9999999			0.00	0.00
03/01/2013	Install	PAN-500-0045	9999999			0.00	0.00
03/01/2013	Install	TANK-1000-0...	9999999			0.00	0.00
03/01/2013	Install	TANK-1000-0...	9999999			0.00	0.00
03/01/2013	Install	TANK-250-0001	9999999			0.00	0.00
03/01/2013	Install	TANK-250-0002	9999999			0.00	0.00
03/01/2013	Install	TANK-500-0001	9999999			0.00	0.00
03/01/2013	Install	TANK-500-0034	9999999			0.00	0.00
03/06/2013	Removal	HOSE-25-0005	9999999			0.00	0.00
03/06/2013	Removal	NOZ-DSL-0010	9999999			0.00	0.00
03/06/2013	Removal	TANK-500-0001	9999999			0.00	0.00

What Does Equipment Manger Do?

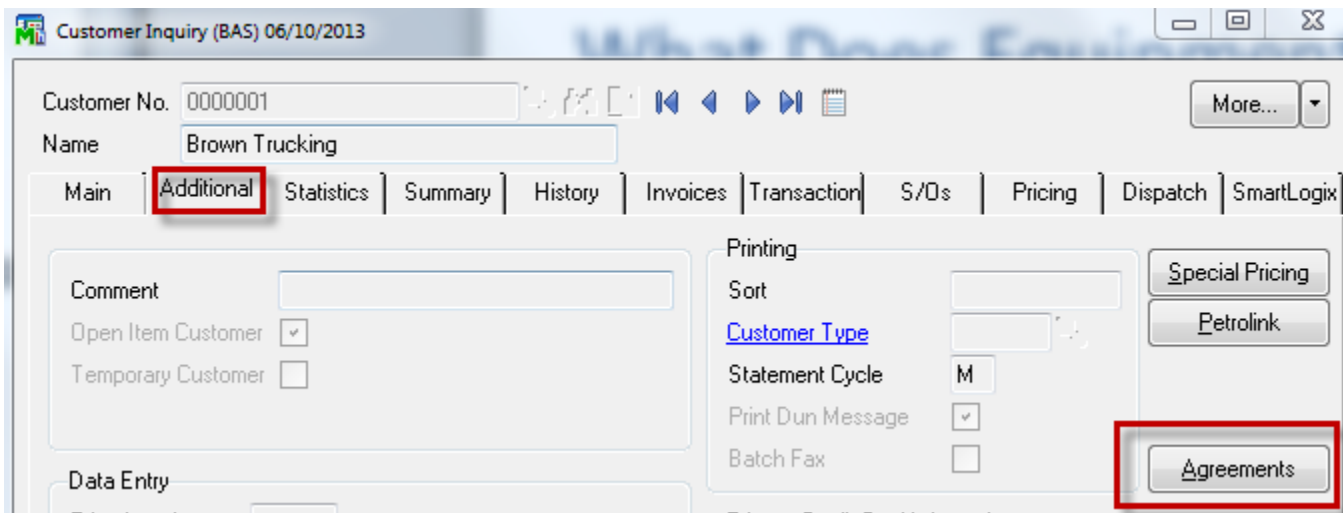


What Does Equipment Manger Do?

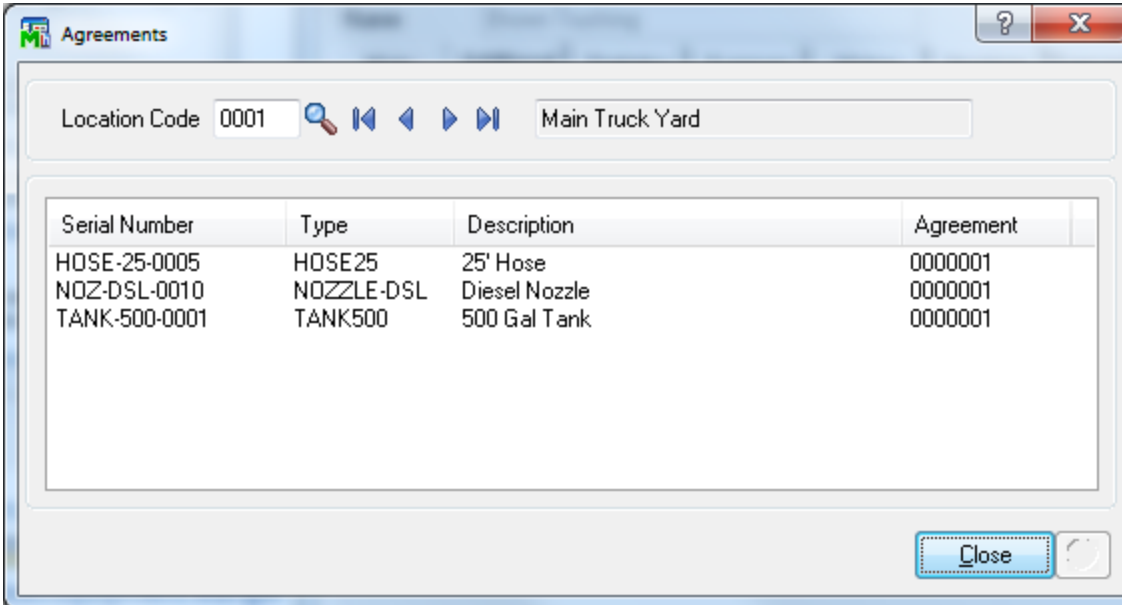


What Does Equipment Manger Do?

- Your CSRs can quickly see a customer's agreements from within AR Customer Inquiry



What Does Equipment Manger Do?



Serial Number	Type	Description	Agreement
HOSE-25-0005	HOSE25	25' Hose	0000001
NOZ-DSL-0010	NOZZLE-DSL	Diesel Nozzle	0000001
TANK-500-0001	TANK500	500 Gal Tank	0000001

What Does Equipment Manger Do?

- Are your customer's meeting their agreements? Are they buying product from another distributor?

	Period To Date	Year To Date	Life To Date
Sales Amount	1,635.00	14,994.00	14,994.00
Quantity	500.0	4,900.0	4,900.0
Gross Profit	2.50	140.50	140.50
Service Cost	.00	.00	.00

Contract Adjustment Qty: 0.0
Contract Adjustment Sales: .00

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What Does Equipment Manger Do?

Agreement Performance Report

BASIC OIL COMPANY (BAS)

	Per 1	Per 2	Per 3	Per 4	Per 5	Per 6	Per 7	Per 8	Per 9	Per 10	Per 11	Per 12	Total
Agreement:	0000001	500 GAL TANK - DIESEL			Product		Equipment No	Description					
	0000001	Brown Trucking			Clear Diesel		HOSE-25-0005	25' Hose					
	0001:	Main Truck Yard			Service		NOZ-DSL-0005	Diesel Nozzle					
							TANK-500-0001	500 Gal Tank					
Qty Sold	0.0	0.0	3500.0	900.0	500.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4900.0
\$ Sold	0.00	0.00	10,605.00	2,754.00	1,635.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14,994.00
Profit \$	0.00	0.00	102.50	40.50	-2.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	140.50
Profit %	0.000%	0.000%	0.967%	1.471%	-0.153%	0.000%	0.000%	0.000%	0.000%	0.000%	0.000%	0.000%	0.937%
Prj Units	0.0	0.0	1000.0	1000.0	1000.0	1000.0	1000.0	1000.0	1000.0	1000.0	1000.0	1000.0	10000.0
Diff	0.0	0.0	2500.0	-100.0	-500.0	-1000.0	-1000.0	-1000.0	-1000.0	-1000.0	-1000.0	-1000.0	-5100.0

Report Totals:

Qty Sold	0	0	3,500	900	500	0	0	0	0	0	0	0	4,900
\$ Sold	0	0	10,605	2,754	1,635	0	0	0	0	0	0	0	14,994
Profit \$	0	0	103	41	-3	0	0	0	0	0	0	0	141
Profit %	0.000%	0.000%	0.967%	1.471%	-0.153%	0.000%	0.000%	0.000%	0.000%	0.000%	0.000%	0.000%	0.937%
Prj Units	0	0	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	10,000
Diff	0	0	2,500	-100	-500	-1,000	-1,000	-1,000	-1,000	-1,000	-1,000	-1,000	-5,100

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What Does Equipment Manger Do?

- You want to see what has gone thru the equipment

Serialized Equipment Maintenance (BAS) 05/31/2013

Equipment No. TANK-500-0001

Description 500 Gal Tank

1. Main | 2. Transactions

Trans Date	Type	Agreement No.	Customer No.	Ship To	Invoice No.	Quantity	Amount
03/01/2013	Install	MAIN	9999999			0.00	0.00
03/06/2013	Removal	MAIN	9999999			0.00	0.00
03/06/2013	Install	0000001	0000001			0.00	0.00
03/10/2013	Sales	0000001	0000001	0001	0000005	2,000.00	6,000.00
03/20/2013	Sales	0000001	0000001	0001	0000006	1,500.00	4,605.00
04/11/2013	Sales	0000001	0000001	0001	0000007	900.00	2,754.00
05/25/2013	Sales	0000001	0000001	0001	0000008	500.00	1,635.00
05/31/2013	Service	0000001	0000001	0001	0000011	1.00	0.00

Accept Cancel Delete

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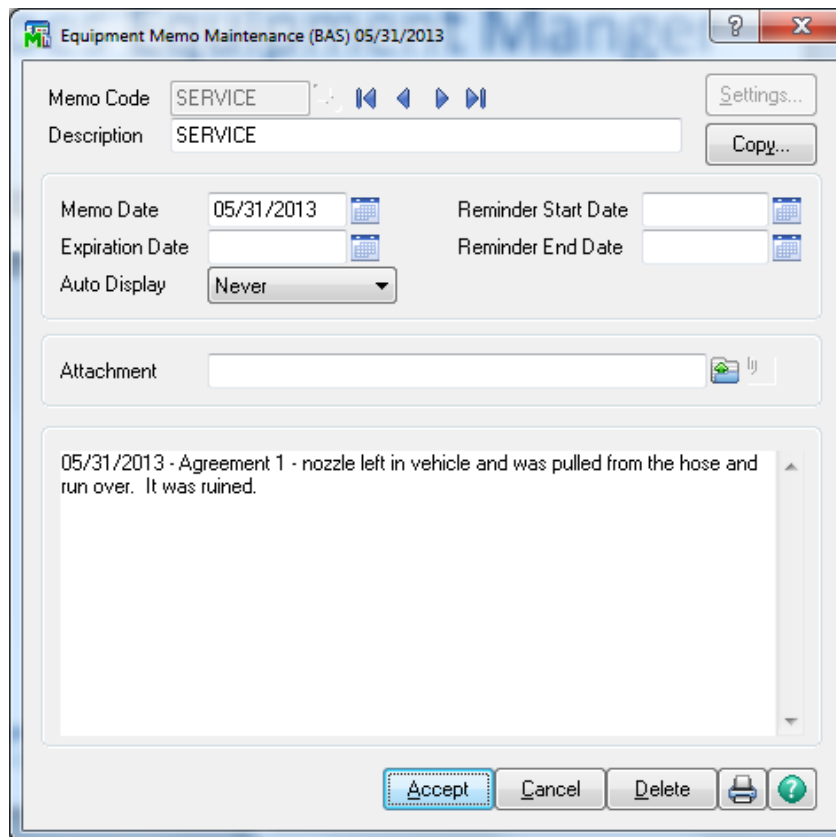
What Does Equipment Manger Do?

- You want to see what service the equipment has received

The screenshot displays the 'Serialized Equipment Maintenance (BAS) 05/31/2013' window. The 'Equipment No.' field contains 'NOZ-DSL-0010' and the 'Description' field contains 'Diesel Nozzle'. Below these are tabs for '1. Main' and '2. Transactions'. The 'Vendor Number' is '0000004' for 'Tank Equipment, Inc', with 'Vendor Serial No 1' as '1286-UG34-6394'. The 'Equipment Type' is 'NOZZLE-DSL' for 'Nozzle - Diesel'. A 'Note' field contains the text: '05/31/2013 - nozzle left in vehicle and was pulled from the hose and then was run over. It was ruined.' The bottom section shows dates: Purchase Date (03/01/2013), Next Inspection Date (06/01/2013), Anniversary Date (03/01/2014), and Manufacture Date (02/25/2013). It also lists 'Capacity' (.00), 'Purchase Cost' (56.000000), 'PTD Units' (.00), 'YTD Units' (4,900.00), and 'LTD Units' (4,900.00). At the bottom right are buttons for 'Accept', 'Cancel', 'Delete', and a help icon.

What Does Equipment Manger Do?

- You want to see what service the equipment has received



The screenshot displays the 'Equipment Memo Maintenance (BAS) 05/31/2013' window. The interface includes the following fields and controls:

- Memo Code:** SERVICE
- Description:** SERVICE
- Memo Date:** 05/31/2013
- Expiration Date:** (empty)
- Auto Display:** Never
- Reminder Start Date:** (empty)
- Reminder End Date:** (empty)
- Attachment:** (empty)
- Text Area:** 05/31/2013 - Agreement 1 - nozzle left in vehicle and was pulled from the hose and run over. It was ruined.

Buttons at the bottom include: Accept, Cancel, Delete, Print, and Help.

What Does Equipment Manger Do?

- You want to see the agreement's activity

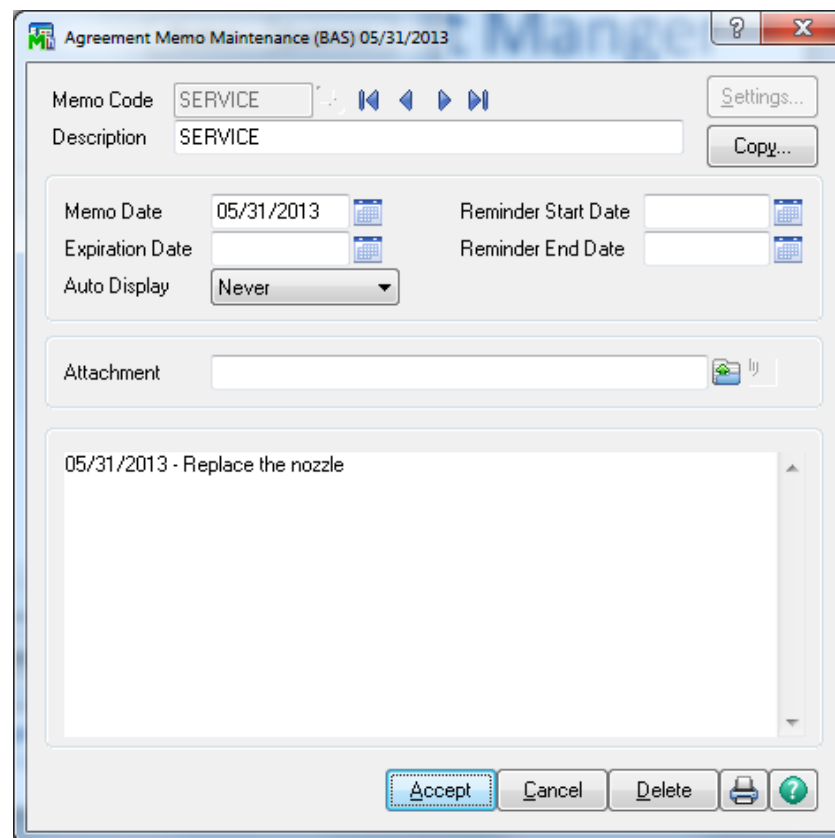
Trans Date	Type	Equipment No.	Customer No.	Ship To	Invoice No.	Quantity	Amount
03/20/2013	Sales	HOSE-25-0005	0000001	0001	0000006	1,500.00	4,605.00
03/20/2013	Sales	NOZ-DSL-0010	0000001	0001	0000006	1,500.00	4,605.00
03/20/2013	Sales	TANK-500-0001	0000001	0001	0000006	1,500.00	4,605.00
04/11/2013	Sales	HOSE-25-0005	0000001	0001	0000007	900.00	2,754.00
04/11/2013	Sales	NOZ-DSL-0010	0000001	0001	0000007	900.00	2,754.00
04/11/2013	Sales	TANK-500-0001	0000001	0001	0000007	900.00	2,754.00
05/25/2013	Sales	HOSE-25-0005	0000001	0001	0000008	500.00	1,635.00
05/25/2013	Sales	NOZ-DSL-0010	0000001	0001	0000008	500.00	1,635.00
05/25/2013	Sales	TANK-500-0001	0000001	0001	0000008	500.00	1,635.00
05/31/2013	Service	HOSE-25-0005	0000001	0001	0000011	1.00	0.00
05/31/2013	Removal	NOZ-DSL-0010	0000001	0001		0.00	0.00
05/31/2013	Install	NOZ-DSL-0005	0000001	0001		0.00	0.00
05/31/2013	Service	NOZ-DSL-0005	0000001	0001	0000011	1.00	0.00
05/31/2013	Service	TANK-500-0001	0000001	0001	0000011	1.00	0.00

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What Does Equipment Manger Do?

- You want to see the agreement's activity



What Does Equipment Manger Do?

- Do you need a printed agreement or document for your customer to sign?
- With a Word document using a set of merge fields from the agreement, you can create a document which can then be modified, saved and printed.

What Does Equipment Manger Do?

- What is your ROI on your equipment?
 - You have all the information you need to calculate the ROI
 - With the performance report and the equipment cost, you can easily see your ROI.

What Does Equipment Manger Do?

Agreement Performance Report

BASIC OIL COMPANY (BAS)

	Per 1	Per 2	Per 3	Per 4	Per 5	Per 6	Per 7	Per 8	Per 9	Per 10	Per 11	Per 12	Total
Agreement:	0000001	500 GAL TANK - DIESEL			Product		Equipment No	Description					
	0000001	Brown Trucking			Clear Diesel		HOSE-25-0005	25' Hose					
	0001:	Main Truck Yard			Service		NOZ-DSL-0005	Diesel Nozzle					
							TANK-500-0001	500 Gal Tank					
Qty Sold	0.0	0.0	3500.0	900.0	500.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4900.0
\$ Sold	0.00	0.00	10,605.00	2,754.00	1,635.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14,994.00
Profit \$	0.00	0.00	102.50	40.50	-2.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	140.50
Profit %	0.000%	0.000%	0.967%	1.471%	-0.153%	0.000%	0.000%	0.000%	0.000%	0.000%	0.000%	0.000%	0.937%
Prj Units	0.0	0.0	1000.0	1000.0	1000.0	1000.0	1000.0	1000.0	1000.0	1000.0	1000.0	1000.0	10000.0
Diff	0.0	0.0	2500.0	-100.0	-500.0	-1000.0	-1000.0	-1000.0	-1000.0	-1000.0	-1000.0	-1000.0	-5100.0

Report Totals:

Qty Sold	0	0	3,500	900	500	0	0	0	0	0	0	0	4,900
\$ Sold	0	0	10,605	2,754	1,635	0	0	0	0	0	0	0	14,994
Profit \$	0	0	103	41	-3	0	0	0	0	0	0	0	141
Profit %	0.000%	0.000%	0.967%	1.471%	-0.153%	0.000%	0.000%	0.000%	0.000%	0.000%	0.000%	0.000%	0.937%
Prj Units	0	0	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	10,000
Diff	0	0	2,500	-100	-500	-1,000	-1,000	-1,000	-1,000	-1,000	-1,000	-1,000	-5,100

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Reporting

- Equipment Listing
 - Can be sorted by the equipment number, the equipment type or by the vendor
 - You can insert a page break at a change in whatever you are sorting by
 - You can include notes or the memos

Reporting

- Equipment and Agreement Memo Listings
 - Prints a listing of the memos you have attached to your equipment and your agreements
 - Has the same options as any other memo listing

Reporting

- Agreement Report
 - Gives you a listing of your agreements
 - Can be sorted by the agreement number, customer number or by salesman

Reporting

- Agreement Performance Report
 - This is THE report you want to run
 - The products and equipment assigned to the agreement are displayed
 - The monthly gallons and the actual gallons are displayed
 - In addition to the gross profit percentage, the gross profit dollars are displayed

Reporting

- Agreement Performance Report
 - You can choose to print the prior year information for comparison to the current year
 - You can tell it a Gross Profit range to print. If you choose zero dollars for both ends of the range, you will get a listing of your agreements that have not had any activity

Reporting

- Agreement Performance Report
 - A summary can be printed comparing the YTD totals to the Life to Date totals, giving a variance

Agreement Performance Report

BASIC OIL COMPANY (BAS)

Agreement Number	Customer Number		YTD Agreement Totals			LTD Agreement Totals			LTD PRJCTD	
			Volume	Dollars	GP%	Volume	Dollars	GP%	Volume	Variance
0000001	0000001	Brown Trucking	4,900.0	14,994.00	0.94	4,900.0	14,994.00	0.94	24,000.0	19,100.00
		Report Total:	4,900.0	14,994.00		4,900.0	14,994.00			

Things to Consider

- Please take advantage of your consultant – they can help you to determine the best way to set up your system
- Equipment Manager is only as good as the information you put in it

Questions

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Learn how DM2's WebLink Web Portal will free up your employees to focus on growing your business

Join us for a Webinar on July 11

REGISTER NOW

Space is limited.

Reserve your Webinar seat now at:

<https://www.linkedin.com/events/r957098409>

DM2 Software invites you to attend our "WebLink Web Portal" webinar on July 11, 2013 at 11:30am Pacific Time/1:30pm Central Time. Join DM2 Professional Services Consultant, Lisa Marley, to learn how DM2's WebLink interface combined with Petrolink's Web Portal solution will free your employees up to focus on growing your business. Find out how this comprehensive solution offers bi-directional integration with your Petrolink Insights system and your web site to enable your customers and dealers to login, browse and print:

- Daily Customer/Dealer Fuel Pricing
- Dealer EFT Notifications
- Dealer Credit Card Batch Information
- Sales Order History
- Open Invoices
- Invoice History
- Account Information

Also learn how you can give your customers the ability to order packaged lubricants and pay their open invoices online by adding DM2's optional Shopping Cart and Online Invoice Payment with Real-time Credit Card Processing features.

The webinar will also provide you with an overview of the technical requirements for setting up your interface and portal as well as how the data flows from your Petrolink Insights system to the web portal.

Who should attend?

- Owners and other Top Executives involved in developing your eCommerce strategy
- Sales and Customer Service Managers looking to leverage your web site to increase sales, improve customer service and employee productivity
- IT personnel involved in supporting your eCommerce initiatives

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