



Petroleum Insights CRM

Bringing CRM to the petroleum industry

Fully-integrated
Customer Relationship Management and
ERP Systems designed exclusively for
petroleum marketers

www.dm2.com

Marketing | Sales | Customer Service | Support



Integration Meets Automation

Petroleum Insights CRM, a standard feature found in all DM2 *Petroleum Insights* complete accounting/ERP systems, offers unparalleled integration to empower your entire organization from marketing and sales to customer service and support to identify your highest value prospects and customers. With over 25 years of experience serving the petroleum marketing industry, DM2 has tailored *Petroleum Insights CRM's* menus, screens and workflows to meet the unique needs of petroleum marketers. Unlike other so-called integrated systems that rely on periodic batch imports/exports or expensive API call-outs, *Petroleum Insights CRM* was designed from the start to be integrated with DM2's *Petroleum Insights* complete accounting/ERP system. Give your marketing, sales, customer service and support staff the real-time access to accurate up-to-the-minute information on your prospects and customers information when and wherever they need it. Automate your marketing campaigns, reduce your sales cycles and streamline your routine processes all while improving customer satisfaction, customer retention and return on investment.



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CRM Enhancements for Petroleum Marketers

A Sage Master developer since 1989, DM2 Software has taken Sage CRM to the next level with *Petroleum Insights CRM*. Standard CRM enhancements for the petroleum marketing industry include:

iPad/Surface Optimization – all DM2 enhanced CRM Fields, Screens, Lists & Tabs have been optimized for use on iPad, Surface & other mobile devices

DM2 CRM Lead, Opportunity & Case Workflows - standardized sales process workflows based on established major oil company sales processes and case management workflows based on industry best practices

Opportunity Gallons/GP Statistics Box - view sales opportunity pipelines by gallons and gross margin

DM2 CRM User Adoption Dashboard - monitor CRM usage to measure adoption rates

DM2 Data Access - access to DM2 *Petroleum Insight's ERP* system revenue data within CRM

Ship-To Address Enhancements - assign reps and track communications, opportunities and cases at the address/location level.



The screenshot displays a funnel chart on the left with five phases: Phase I - Qualification (1), Phase II - Needs & Solutions Identification (2), Phase III - Presentation (3), Phase IV - Activate & Transition (4), and Phase V - Retain & Grow (5). To the right is a statistics box for all stages:

Number of Opportunities:	116	Margin:	USD 4,638,253.24	Weighted Margin:	USD 2,864,550.40
Average Value:	USD 39,884.94	Average Certainty:	37.56%	Weighted Average:	USD 14,994.35
Gallons:	7,777,000.00	Weighted Gallons:	3,295,200.00		
Avg Gallons:	65,352.94	Weighted Avg. Gallons:	23,886.58		

Below the statistics is a table of 119 opportunities:

Stat	Company Name	Person	Business Line	Business Segment	Stage	Stage	Certainty%	Gallons	GP (USD)	Assigned To	Updated Date	Status
	XYZ	Richard Sherman	Lubes - Private Label	Lubes	4-Quoted	75	250,000.00	30,000.00		Tom Lee/Name	12/17/2016 12:18 PM	In Progress
	Wolf Pumps	Thomas P Dowling	Lubes - IND	Lubes	3-Value Proposition	50	150,000.00	18,000.00		System Administrator	12/17/2016 12:18 PM	Stage: --E--
	Weyman Cable Systems	Andrew White	Fuel - Tankwagon - Gasoline	Lubes, Fuel, Chemicals	1-Quoted	0	150,000.00	18,000.00		System Administrator	12/17/2016 12:18 PM	Business Segment: --A--
	Winstar Enterprises Ltd.	Jim Murphy	Fuel - Tankwagon - Diesel	Lubes and Fuel	2-Identify Needs	20	150,000.00	18,000.00		Steve Minc	12/17/2016 12:22 PM	Assigned To: --A--

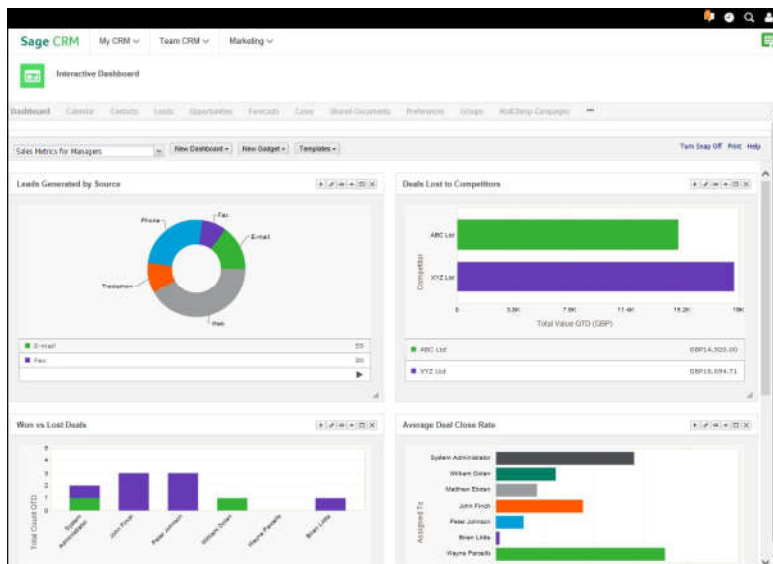
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CRM Enhancements for Petroleum Marketers

Other standard *Petroleum Insights CRM* enhancements for the petroleum marketing industry include:



DM2 CRM Sales Action Dashboard – automatically detects and alerts representatives and sales managers via e-mail notifications when follow-up tasks have not been performed as scheduled. E-mail alerts include direct link to the opportunity that requires attention.

Entry-level CRM Reporting, Dashboards & Notifications – standardized Sales Dashboard with My Opportunities, My Calendar and My Accounts and 150+ standard CRM reports and basic automated notifications.

Customer Onboarding Workflow & Dashboard – automates the credit application submission/approval process and set-up of new customers in both CRM and DM2 Petroleum Insight’s ERP system with the press of a button while providing progress notifications to Sales.

New Customer Welcome Communication Workflow - a pre-defined set of documents (ex., Welcome letter, MSDSs, Emergency Contacts, etc..) can be automatically sent out to new customers.

MailChimp E-mail Marketing Integration - out-of-the-box integration with optional MailChimp e-mail services





Advanced CRM Features for Petroleum Marketers

Based on our experience working with petroleum marketers, DM2 has also developed the following Advanced CRM Features to give marketers an even higher level of integration and automation:

Mobile Order Entry – generate quotes and submit orders on iPad, Surface & other mobile devices using all the pricing and fuel tax information set-up in your DM2 *Petroleum Insight's* ERP system.

DM2 ERP AR Customer Memo Sync – automatically adds DM2 Petroleum Insight's ERP system AR Customer Memos to CRM company notes or communications.

Single CRM/ERP Sign-in - eliminates the need for CRM users to login and open a separate DM2 Petroleum Insight's ERP system screen to access AR Customer Maintenance information.

Entry Level Marketing - create marketing campaigns by importing prospect lists and creating target marketing lists to manage e-mail and telemarketing campaigns. Also provides an interface to optional MailChimp e-mail marketing services.

Equipment Management Workflow – provides an automated process based on industry best practices to track and manage loaned/leased equipment from start to finish.

CRM AR Collections Manager – integrate with the Accounts Receivable module to automatically flag overdue invoices. Also provides tools to better monitor and manage the collection call process.

DocuSign Signature Capture Integration – integrate with optional DocuSign services to capture signatures and store any document in CRM.



DocuSign PowerForms Integration – integrate with optional DocuSign services to give customers the ability to complete forms on your web site and automatically import information into CRM.

Project Transform – integrates with Chevron's mPower platform to provide reporting, sales pipeline, coaching dashboard, KPI metrics and workflows designed to meet Chevron's Project Transform CRM requirements.





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Consulting & Training

DM2's Professional Services' consultants have over 250 years of combined petroleum industry consulting experience. This experience, along with the extensive training they receive from DM2 and Sage Software, provides them with the expertise to implement DM2's *Petroleum Insights CRM* systems to meet your unique business needs. In addition to helping you implement your system, DM2's consultants provide project planning and management, report design and training services.

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 and Sage CRM, ERP and CRM 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 Sage Software development partner and has ranked as a Top 10 Sage 100 reseller since 1999.

Custom Programming

DM2's Programming staff understands that no two marketers operate exactly the same way. As a result, DM2 offers custom programming to tailor your *Petroleum Insights* system to further streamline and automate the processes that are unique to your business. Our U.S.-based team of programmers have extensive industry experience, giving them the ability to quickly understand and respond to your development needs.



Technical Support

DM2's Support Team's mission is to handle any issue with your Petroleum Insights system that interferes with your business. In short, their job is to put you back in operation in as little time as possible so that the impact your business is minimal. In addition to resolving issues, DM2's Support Team is also available to answer questions about product features and how the system operates. With DM2's Unlimited Assistance Plan, there is no limit to the number of cases/incidents you may bring to our attention of the DM2 Support Team, nor is there a limit to the amount of time DM2 Support Agents will spend on the resolution of your cases.

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