

DM2 CardLink Module

DM2 CardLink Features:

- Theft Alerts
- Card Management
- Flexible Billing Cycles
- Bank Card Reconciliation
- Excise Tax Reporting
- Unlimited Special Pricing
- Flexible Invoicing
- Sales Analysis Reporting
- Gross Profit Analysis Reporting

Supported Networks:

- CFN
- Pacific Pride
- Voyager
- Fuelman
- Mannatec
- Farm Plan
- Proprietary

Supported Equipment:

- Petro Vend – K800, K2500, System2 and FSC3000 Formats
- Gasboy - 1000

DM2 CardLink[®] module fully integrates your cardlock operations with your *Petroleum Insights* system. CardLink is designed to work with multiple networks and processors like CFN, Pacific Pride, Voyager, Fuelman, Mannatec, Farm Plan and proprietary card transactions. In fact, marketers use CardLink to process more CFN and Pacific Pride transactions than any other billing application on the market today.

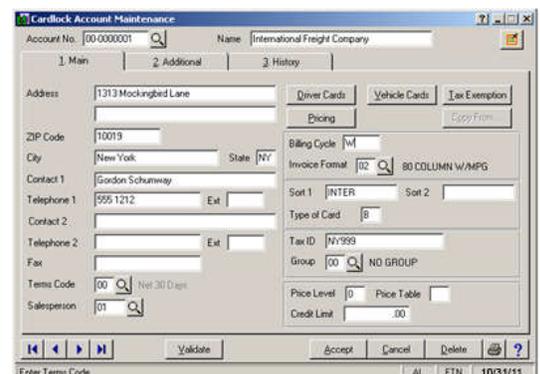
CardLink offers unprecedented pricing flexibility. Price transactions using “cost plus”, OPIS, “retail plus/minus” as well as offer volume-based discounts. Set prices on an individual site and product basis or by region or product group to easily maintain pricing for multiple sites and products. Prices changes are both date and time sensitive to account for mid-day price changes. Transaction fees can quickly be applied to all sites on a global basis, to specific sites only, vary from site-to-site or be excluded entirely by site or account. Tax rates can also be easily applied and changed on a global basis or site-by-site basis.

CardLink also offers unprecedented invoicing flexibility. CardLink’s standard invoice formats include all transaction details, an itemized breakdown of all applicable federal, state, and local taxes as well as useful fleet management information like “cost per mile”, MPG, and total miles driven. Transactions can be grouped by card or vehicle. Billing cycles can be daily, weekly, semi-monthly, or monthly with percentage or cents off per gallon discounts for prompt payments. Using *Petroleum Insights*’ standard Outbox feature, you can automatically fax or e-mail your customers cardlock price quotes and invoices. Outbox can also be used to e-mail invoices in a .csv file format, so your customers can easily import their transaction data into their fleet maintenance systems.

CardLink also offers a host of standard reports. Ensure your prices and margins are correct before you generate invoices with CardLink’s Gross Profit Analysis Report. CardLink also includes Customer, Product, Site and Transaction Sales History Reports, a Credit Exposure Report and many others. CardLink sales data can also be accessed by *Petroleum Insights*’ standard SQL Datawarehouse Reporting feature to give even more ways to drill into information and report on your cardlock operations.

CardLink’s Alerts feature can alert you to potential theft problems before they get out of hand. CardLink Alerts can automatically e-mail you alerts whenever cards or accounts fuel on days and/or at times they are not permitted to fuel, exceed a defined number of transactions per day and exceed a defined number of gallons per transaction. You can even automatically e-mail alerts to your customers whenever these conditions occur.

CardLink can also be purchased as a stand-alone system.



The screenshot shows a software window titled "Cardlock Account Maintenance" for account number 00-000001, belonging to International Freight Company. The interface includes tabs for Main, Additional, and History. Fields include Address (1313 Mockingbird Lane), ZIP Code (10019), City (New York, NY), Contact 1 (Gordon Schurway), Telephone 1 (595 1212), and Fax. Billing Cycle is set to MW, Invoice Format to 80 COLUMN W/MPG, and Sort 1 to INTER. Other fields include Type of Card (B), Tax ID (NY999), Group (NO GROUP), Price Level (0), and Credit Limit (.00). Buttons for Validate, Accept, Cancel, and Delete are visible at the bottom.

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Polling	Automatically capture fueling transactions from any number of Gasboy or Petro Vend systems at predefined times. You can also retrieve tank gauge data such as inventory levels and alarm reports at the same time.
Tax Reporting	Complete federal, state and local tax reporting includes excise and sales taxes. Customer tax exemptions can be applied by account, card or vehicle.
Pricing	Pricing options include: rack plus, OPIS, SCPC, retail +/-, volume discounts and can vary by customer or fueling site. Unlimited special pricing brings unprecedented flexibility for establishing your own pricing and margin levels and handling fixed, contract, or group pricing.
Prompt Payment Discounts	Create incentives for prompt payments by offering percentage or cents per gallon discounts.
Customer Analysis	Standard reporting shows 24 months of history by customer and by customer/by product. Cents per gallon gross profit reports are net of taxes. Customer rankings by sales shows where your business is growing and helps you become more competitive.
Card Management	Enter and edit card information in CardLink and automatically update select Petro Vend card systems (contact DM2 for details).
Credit Management	Manage your credit exposure with automatic credit warnings that show when a customer's balance is within 10 percent of their credit limit including unbilled transactions.
Transaction History	Reprint customer transactions by account, card or invoice number for any date range.
Mobile Fueling	Optional add-ons gives you the ability to invoice mobile fueling transactions from your AWE, F-RAMS, MID:COM, SMARTLogix or Symbology truck automation systems.

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 products and services, e-mail dm2sales@pdisoftware.com, call (800) 866-5151, or visit the DM2 Software website at www.dm2.com.

AVAILABILITY:

***Petroleum Insights*
Version 4.30 or later**

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