

## DM2 Software's *Petroleum Insights* Home Heat/Propane Module

### DM2's Home Heat/Propane Module Features:

- Degree-Day, Julian and Table Scheduling
- Relationship Tank Delivery Scheduling
- Separate Multi-Drop Delivery Tracking and Scheduling
- User-Definable Budget and Payment Plans
- Monthly Billing for Service Plans
- Ticket Printing by Zone with Driver Instructions
- Immediate Customer Inquiry for Credit, Address, Memos, Driver Instructions, Delivery History, Aging and Billing Detail
- Truck and Driver Productivity Reports
- Provide for Deliveries of Fuels and Non-Fuel Items like Labor, Parts, etc.
- Track Profitability by Customer
- Interfaces with Accounts Receivable, Inventory Management, Sales Order and General Ledger

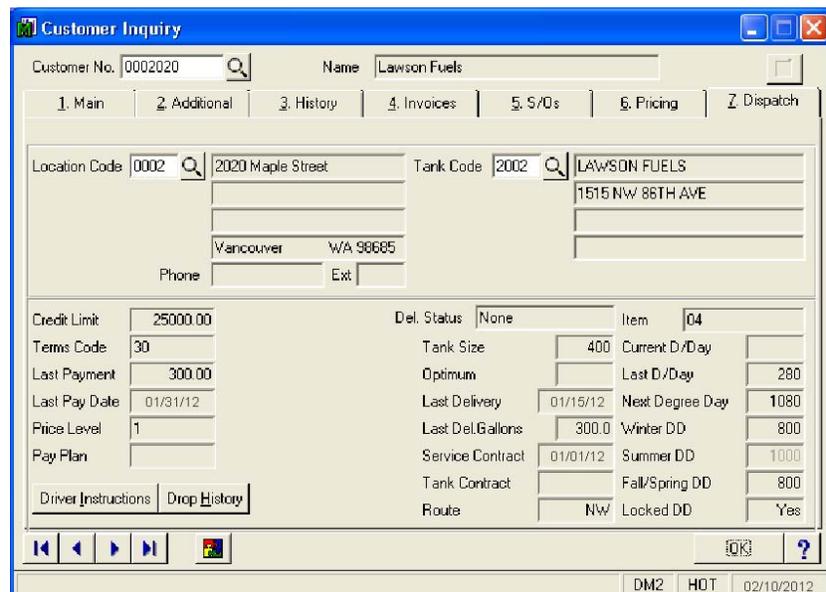
Optimize your home heating and propane deliveries with the time-tested Degree-Day, Julian and Table scheduling features available in *Petroleum Insights*' Home Heating/Propane module. Complete integration with Accounts Receivable Customer Inquiry feature gives you immediate access to all of your customers' vital credit, payment history, current aging, address, delivery history, billing detail, degree day, budget plan information and much more – all in one convenient location.

Simplified screen inquiries and extensive search capabilities will save you time accessing your customers' information. Quickly and easily look up accounts by entering any part of an account name, address, phone number, ZIP code and more.

Customer profitability reports take into account both fuel deliveries and service calls.

The Home Heat/Propane module is also fully integrated with the General Ledger, Sales Order and Inventory Management modules, eliminating the need to enter information in multiple modules.

Leverage DM2's 20 plus years of experience with heating oil/propane dealers to help make your company more competitive in a tough market.



**Customer Inquiry**

Customer No. 0002020 Name Lawson Fuels

1. Main 2. Additional 3. History 4. Invoices 5. S/O's 6. Pricing Z Dispatch

Location Code 0002 2020 Maple Street Tank Code 2002 LAWSON FUELS  
1515 NW 86TH AVE  
Vancouver WA 98685  
Phone Ext

Credit Limit	25000.00	Del. Status	None	Item	04
Terms Code	30	Tank Size	400	Current D/Day	
Last Payment	300.00	Optimum		Last D/Day	280
Last Pay Date	01/31/12	Last Delivery	01/15/12	Next Degree Day	1080
Price Level	1	Last Del.Gallons	300.0	Winter DD	800
Pay Plan		Service Contract	01/01/12	Summer DD	1000
		Tank Contract		Fall/Spring DD	800
		Route	NW	Locked DD	Yes

Driver Instructions Drop History

DM2 HOT 02/10/2012

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<b>Degree Day, Julian and Table Scheduling</b>	Optimize deliveries based on Degree Day - Hot Water, Degree Day - No Hot Water, Julian, and table schedules. Customer delivery intervals can be automatically updated based on actual deliveries, or you may lock them. The system maintains a history of degree day and K-Factor values for each delivery made.
<b>Relationship Drops</b>	Automatically produce tickets for nearby tanks when a "Relationship" delivery is scheduled, to save long runs back to zones just fulfilled. Use this function to assist in optimizing your deliveries.
<b>Powerful Account Lookup</b>	Instantly gain access to your customer data by searching on any part of a customer name, address, phone number, ZIP code, city, and many more. You can also set multiple selection criteria, by user.
<b>Order Taking</b>	Convert inquiries into orders when your customers are on the phone by instantly accessing their delivery history and checking their credit limits. Capture delivery notes and instructions and use "quick-print" tickets during the order-taking process to speed up dispatch and delivery. Freight costs can also be automatically calculated using a point to point method.
<b>Multi-Drop Scheduling</b>	Assign multiple tanks with different delivery schedules and intervals to a specific Accounts Receivable account, allowing for maximum credit control without sacrificing delivery efficiency. This scheduling option is perfect for landlords and property managers with multiple properties.
<b>Flexible Budget and Payment Plans</b>	Create budget and payment plans to fit your customers' needs. Set-up fixed or variable budget and payment plans based on gallons or dollars.
<b>Multiple Price Levels</b>	Price tickets for your customers at several levels. Each price level can have a schedule for volume-based price breaks. This helps make sure your pricing agreements are honored - especially with your high-volume commercial accounts.
<b>Automatic Billing for Service Contract and/or Tank Insurance</b>	Automatically include annual charges for service contracts and tank insurance on your customers' regular monthly statements in the month you designate or in their budget payments, without the need to manually generate these charges.
<b>Unlimited Memo Recording</b>	Enter an unlimited number of memo notes for your customers and organize them by categories, such as credit conversations, furnace specifications, installation quotes, repair notes, and delivery notes. Reminder dates can be entered for each memo to automatically remind your sales representatives or credit personnel when to make follow-up calls.
<b>Management and Sales Reporting</b>	Track key performance indicators like number of deliveries, total gallons per delivery, and average gallons per delivery on a month-to-date and year-to-date basis, by driver, and by truck. Easily calculate customer profitability on month-to-date and year-to-date basis.

## 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).

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## AVAILABILITY:

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