Issue 15: Winter 2014

The Perspective

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A Publication for the Convenience Store and Petroleum Marketing Industries

The Best Of the Best

Your Top Picks From Pinnacle Summit

FUEL SMART 6.0

Keeping a Close Watch With Loss Prevention

Recipe for Success

Using the Quoting Module in Fuel Smart

+

Custom Mobile Dashboards in EPM

What's New in Dynamics GP 2013

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COMING UP...

JAN 26-29
SIGMA EXECUTIVE LEADERSHIP CONFERENCE
STEAMBOAT

JAN 28-30
CSP CONVENIENCE RETAILING UNIVERSITY
GLENDALE, AZ

FEB 3-5
BPAMA
SCOTTSDALE, AZ

FEB 10-12
NACS LEADERSHIP FORUM
MIAMI BEACH, FL

FEB 18-20
WPMA
LAS VEGAS, NV

FEB 28-MARCH 1
PACE
KANSAS CITY, MO

MARCH 5-6
SE PETRO
MYRTLE BEACH, NC

APRIL 1-3
M-PACT
INDIANAPOLIS, IN

APRIL 1-3
NACS SOI
CHICAGO, IL

APRIL 8-11
SIGMA SPRING CONVENTION
RANCHO MIRAGE, CA

APRIL 28-MAY 1
PCATS ANNUAL CONFERENCE
TUCSON, AZ

FROM BOB'S PERSPECTIVE

First, I want to express our best wishes to you for this New Year!

2013 was a very good one for Pinnacle and I want to thank all our clients for their continued support. We are blessed to have such a wonderful community of clients whom we are able to support by delivering convenience offerings to the busy consumers. It never ceases to impress me when I consider the number of consumers who are served by our clients and our industry each day. No retail trade, other than perhaps some of the new online 'retail' operations, affect the lives of more people each and every day than the convenience and petroleum industry. Definitely, no retail trade physically interacts with more consumers than does ours.

We believe our role is in helping our clients deliver an exceptional consumer experience. That orientation allows us to take pride in our service not only to our direct customers, but by extension, all consumers. Our systems help keep retail operations efficient and thereby lowering costs. We manage procurement and tracking of more than 20 billion gallons of fuel, which again helps to keep product available and costs low. Our front counter POS solutions expedite a fast, convenient and secure transaction for millions of consumers. We help simplify and highlight trends in merchandise sales and loss prevention, both of which expand consumer choice and help contain costs associated with management of inventory and cash. Lastly, our loyalty solutions help our clients deliver extra value to their most valuable consumers.

Effective use of automation to deliver these benefits requires close cooperation with our clients on the best use of our products and best practices within their operations. We offer training and consulting to help our clients with this. Although I have to say, our client conference is a premier venue for the exchange of this type of information. This issue of The Perspective is focused on a few of the important presentations that were made at our conference last fall. Whether you are a client using some of these tools or not, I believe you can glean some great information and insight to help you with your business.

Again, back to the New Year theme, I hope that you have a most productive and positive 2014. I look forward to seeing you during this next year at some industry meeting or better yet, as a client at the Pinnacle Summit!

Best,

Robert S. Johnson
President
The Pinnacle Corporation

FROM OUR PERSPECTIVE

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LETTER FROM THE EDITOR

The Winter Olympics are just a few weeks away and I couldn't be more excited. It's something I look forward to watching every couple of years. To watch men and women from around the world reach new heights in athleticism is inspiring. World records are broken it seems with each new games. In fact, the Olympic motto written by Pierre de Coubertin, founder of the modern Olympic Games, is "Citius, Altius, Fortius" meaning "Swifter, Higher, Stronger". We are always raising the bar, overcoming weaknesses and pushing past what was once thought the impossible.

While competing in the Olympic Games is rarely a reality for the majority of us, the opportunities to improve and become more efficient surround us daily. And this certainly applies in running your business. The C-store industry and petroleum marketers industry is a complex one with many moving parts. It can be challenging to focus on the most critical components when there is so much competing for your attention.

With that in mind, consider the value of our annual user conference–The Pinnacle Summit. Each fall we come together as users of Pinnacle software to hear from industry experts, share best practices and lessons learned. There is no better opportunity to learn how to fully utilize your Pinnacle software solutions and other solutions to overcoming our industry challenges. Because so much information is shared over the course of those three days, we have taken the opportunity in this issue of The Perspective to review again those presentations that were ranked highest by our Summit attendees. While you can't replace experiencing these presentations live, we hope that with these articles you'll still discover new ways to improve your business. That is to say, to become "Swifter, Higher, Stronger".

Heather Smith
Editor in Chief

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Jennifer Trafelet

WHAT'S NEW AT PINNACLE?

Welcome to these new Pinnacle Clients!

- **Buffalo Services**
- **GLOVIS America, Inc.**
- **Whitaker Oil Company**
- **William G. Johnson Oil Company**

Pinnacle Employees:

Pinnacle welcomes these NEW employees to our team:

Tiffany Adams – Administrative Assistant

Don Godwin – Client Services Representative

Roel Hinojosa – Technical Writer/Trainer

Keith McCabe – IT Technician

Chelsea Pritchett – Contracts Administrator

Mike Vaughn – Director of Professional Services

Denis Witanra – Lead Developer

Events:

- **2014 Annual Advisory Board (AB) Meetings** – All 4 Pinnacle Advisory Board Meetings (POS, Retail Marketing, Retail Operations, and Fuel) will take place February 3-5 at the NYLO Hotel in Las Colinas, Texas. Pinnacle client AB members will meet with Pinnacle product management to discuss current and impending issues that the convenience retail and petroleum marketing industries face, and how Pinnacle's solutions and services can help solve or at least minimize costly problems being faced by our clients.

- **Pinnacle Summit 2014** – Pinnacle's annual user conference will take place September 9-11 at the beautiful Sheraton Hotel in downtown Dallas, Texas. Congratulations to Pinnacle client, Lee Rucknagel (J.D. Streett & Company) who completed our 2013 feedback survey and won the drawing for a FREE Pinnacle Summit 2014 registration. Stay tuned for more information as we continue to unveil exciting enhancements for the 2014 event. We look forward to seeing everyone in Dallas in September!

Training & Documentation:

In the 4th quarter of 2013, we have released 45 documents to www.pinncorp.com and trained 150 people in 18 classes.

Solution Updates:

Auditor/MWS Version 4.5:

- NEW Retalix POS-BOS Interface
  - » This new interface utilizes the PCATS NAXML format for scanning and polling end of day summary data.
- NEW AcctStat Palm POS AR Interface
  - » The interface will import data from the journal transaction data stored by the AcctStat NIM in the Journal database at the store. The benefit of this automation feature is that the store manager or accounting staff will be able to view all customer in-house charge transactions instead of having to manually key them in.
- NEW Source Column for invoices
  - » To better understand for auditing and review purposes where invoices originated in Invoice Entry, a new column will indicate the source of the invoice as follows:
    - * CAO - The invoice was created by Computer Assisted Ordering.
    - * HH - The invoice was imported from a Pinnacle handheld.
    - * E - The invoice was received through electronic invoicing either manually or automatically.
    - * M - The invoice was manually entered.
    - * OMWS - The invoice was imported from Oasis Manager Workstation.

DWS Version 2.0:

- User Interface Enhancements
- Tank Alerts now include the location description.
- Ability to set an alert rule for gallons sold per hour variance between the projected and actual values.
- Enhanced tank configurations and calculation.
  - » Added Tank Capacity. The tank capacity indicates the maximum desired level of the tank.
  - » Added Fuel Capacity. The fuel capacity is the maximum usable amount.
  - » Added Tank Bottom. The tank bottom indicates the minimum percentage level of the tank.
  - » Added Effective Tank Bottom. The effective tank bottom is a calculated, informational amount and cannot be edited. Fuel Capacity * Tank Bottom / 100
  - » Added Effective Tank Capacity. The effective tank capacity is a calculated, informational amount and cannot be edited. tankcapacity*fuelcapacity/100

- Updated method of calculation for Safe Ullage.
- Apple iOS7 platform is fully supported.
- Tanks and all related tank data can be deleted as needed.

EPM:

- NEW Fiscal POS and Price Book Interface
  - » This new offering supports two interfaces of data. The first is the Fiscal POS interface which utilizes the PCATS NAXML POS-BOS 3.4 format for POS generated transaction data. The second interface is a daily update of Fiscal item catalogue data, including product categorization and suppliers as well as new pricing.

FCA version 2.1:

- Support of Account Balance and Activity Logging - Provides the customer with information about their account that includes: payment terms, available credit amount, and payment history.

Fuel Smart Version 6.0 (Service Packs 1 thru 3):

- User Interface Enhancements
- Enhanced AOD Import and AOD Import Condensed Master Reports
- New AOD pre-process global configurations.
  - » New exception warnings.
  - » New fields in AOD Import Dynamic Import setup.
  - » New fields in AOD Import Edit screen
- Support of SMTP e-mail server.
- New Report: Gallons Sold Comparison Report

Price Book:

- NEW NAXML Vendor Import options
  - » The import includes options to remove leading zeroes from Vendor ID and Item Number when running NAXML Vendor Import. This will address inconsistent supplier identifier formats, particularly when manufacturers are providing the item updates.
  - » NAXML Updated the ItemPrice Document in the NAXML Vendor Import to accommodate GTIN or UPC ids.
- NEW Distribute Price Book Oasis task info
  - » Added text to the status tab of the If the files created are not zipped, it will now be indicated.

Palm POS™ and Payment NIMS:

- CITGO NIM v10.1.0 has been certified by Heartland
- POSReady2009 conversion kits available for UTC terminals

HAPPENINGS

MEMBERS OF THE PINNACLE DEVELOPMENT TEAM SHOWING OFF SOME OF THEIR HOLIDAY SPIRIT.

WE START THEM YOUNG! RICK MORGAN SHOWING NATHAN TURNER THE ROPES OF CLIENT SUPPORT.

THE PINNACLE CREW AFTER A HARD DAY'S WORK BUILDING A HABITAT HOME HERE IN FORT WORTH.

A LONG STANDING TRADITION, THE PINNACLE SALES TEAM WORKS ON THEIR THANK YOU CARDS TO BOOTH VISITORS AFTER THE NACS SHOW IN ATLANTA.

PHOTOBOOTH FUN AT THE PINNACLE HOLIDAY PARTY.

OUR FEARLESS LEADER TAKING A MUCH NEEDED WATER BREAK AFTER SOME TOUGH CONSTRUCTION WORK ON THE HABITAT FOR HUMANITY HOME.

FILLING OUR PLATES AT THE ANNUAL PINNACLE THANKSGIVING POTLUCK.

HOME FRAMING ON THE HABITAT JOB SITE.

how to reduce time while auditing and still **be effective**

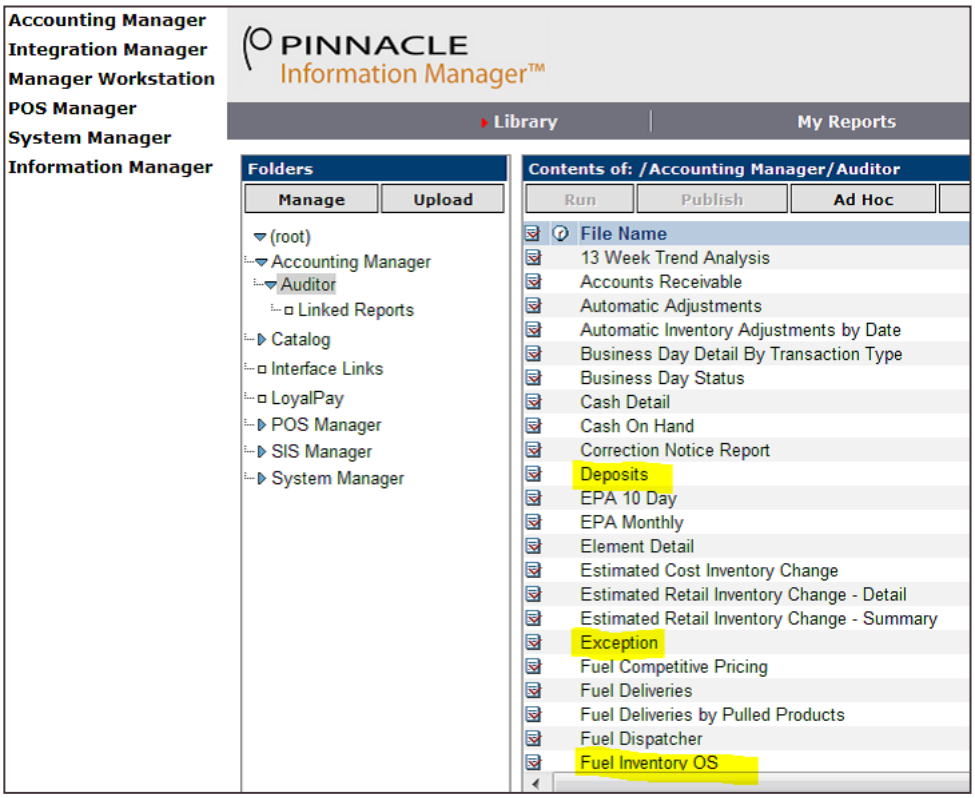
By: Ann Marie Smythe, Controller for Double Quick, Inc.

1. Audit by exception
2. Audit by section, element or tender

Before Auditor - The Dark Ages

Before using Auditor, our processes were not only time consuming, but the end to end process to get the store data reviewed and processed for accounting, was at least a week.

We are now doing *NEXT DAY* auditing, so we're catching problems much sooner. We were waiting on paperwork to get delivered or mailed in and auditing weekly and a week behind.



The Dark Ages:

Store daily close out process

- Stores T-com to office
- Posted to history
- Reports created from data

Weekly corporate audit process

- Packages delivered from each store

Auditor is a time saver and not just at store level. We have been able to reduce our corporate auditing team. We now have the time and available data to research, reconcile, troubleshoot and dig into problem areas/stores.

Areas of Time savings:

- We audit by exception instead of looking at every store to find the problems. Exceptions include:
  - » Variance from register to MWS data
  - » Gallons o/s
  - » Cash o/s
- We audit by tender NOT BY STORE so one person is in charge of cash, another credit cards, etc.

Basic exceptions:

1. Cash over and short
2. Gallons over and short
3. Variance from electronic to MWS

Specific exceptions:

a. Inventory audit over and short – high/low
b. Reminder to key in a certain stat – not zero
c. Invoice balance – zero variance

Auditor: Store daily close out

Data available real time - data is imported from the POS, electronic invoices are imported, everything is accessible immediately.

View status of daily store close outs – We can easily see the status of the store manager's paperwork data, indicating whether or not they have started the day, or closed the day.

We run very little reporting with our Daily Audit at Corporate

- Fuel inventory
- Deposits
- Exceptions

The New Age!

We feel in control of our own data now because we can see what the stores see. Accounting is now serving as a help desk for close out problems. IT is happy!

Central database- Any changes made can be seen by stores, area managers, accounting and anyone else who wants to see in Auditor. Before changes were only made in the accounting software- never pushed back to store level. Also, we can see at what stage and who made the changes. ©

USING THE QUOTING MODULE IN FUEL SMART

Fuel Smart's Quoting module provides a way for users to generate prices and send them electronically to customers. This article follows my Summit presentation on the setup and use of Quoting in Fuel Smart. In it, I will try and explain how you can:

- Learn how to set up Quoting in Fuel Smart to generate fuel prices for Order Entry, Customers, and in-house use.
- Learn how to create Quoting reports, set pricing rules, times, and individual customer quotes.
- Learn how to generate and send quotes by email, fax, and/or file.

Getting Started - Recipes

In order for Quoting to know which pulled product from the source supplier/terminal should be quoted for each delivered (dropped) product, a recipe needs to be created and assigned to each one. Each recipe describes how a dropped product is created. So, when you create a recipe, besides giving it a name, you assign it to a specific dropped product.

After creating a recipe, the percentage of pulled products that make up each recipe is assigned in the Recipe To Product Xref task. For example, a recipe for Regular Unleaded might contain 100-percent Regular, whereas a Recipe for a splash blended product might contain 90 percent Regular and 10 percent Ethanol.

You can have as many recipes for a dropped product as you need. Some of them may be in effect at the same time, giving you different options for creating the same delivered product. However, you can also control the effective status of a recipe by using the Fuel Zone to Recipe Xref. This cross-reference assigns an Effective Date and a Termination Date to each recipe for a particular fuel zone. That way, you can control the possible products for shiptos that belong to a fuel zone where a certain recipe is only available during a specific time of year (for example,

summer vs. winter blends). The fuel zone for a shipto is assigned in Shipto Maintenance.

Option Boxes

Quoting can be turned on or off at many different levels. For example, under Global Setup, the entire module can be shut down. However, there are several other points where a Quoting Module checkbox controls the availability of Quoting at a certain level. These include:

- Carrier to Shipto Xref
- Shipto Dropped Prod Xref
- Supplier to Shipto Xref
- Terminal to Shipto Xref

Customer Quote Group

In order to organize customers into groups for sending quotes, you need to assign them to a Customer Quote Group. The groups are setup in Customer Quote Group maintenance, and they are assigned to each customer in its Customer Credit setup.

For each Customer Quote Group, you must assign a valid effective time range for its quotes. Under the Quote Pricing Period task, you assign each group either the option to follow the effective and expiration times of the associated fuel cost or to simply be in effect for a set number of hours once the quote is generated. Each day of the week can have a different effective time setup, so you can make the quotes sent on Friday, for example, last all weekend vs. maybe a 24 hour period for weekday quotes.

Customer Quote Formats

You have a lot of control over the output of a quote that is sent to a customer. For each type of document you think you will need, you can use the Customer Quote Formats task to design it. Each format includes the header and footer text you wish to display, plus the specific columns and column headers and their order and widths. Each format also includes options for whether or not to show the same graphic as is on sales invoices, to create a new page per shipto, or to skip sending the quote if the price has not changed.

BAILEY OIL COMPANY
CONFIDENTIAL WHOLESALE PRICING

Company: WHOLESALE-BROKER
Attention: PRICING MANAGER
Fax Number:

Term ID	Terminal Name	Supplier Name	Effective Date/Time	Prod ID	Product Description	Invoice Price	Net Price
3607	NuStar- NPlatte, N	Growmark	08-31-13 00:00	20	87 Clear Unleaded	3.12818	3.09690
3607	NuStar- NPlatte, N	P66-Unbrand	08-31-13 00:00	20	87 Clear Unleaded	3.30505	3.27200
3607	NuStar- NPlatte, N	P66-Unbrand	08-31-13 00:00	21	87 Unleaded E10	3.08182	3.05100
3607	NuStar- NPlatte, N	Growmark	08-31-13 00:00	30	91 Clear Unleaded	3.48778	3.45290
3607	NuStar- NPlatte, N	P66-Unbrand	08-31-13 00:00	30	91 Clear Unleaded	3.70909	3.67200
3607	NuStar- NPlatte, N	P66-Unbrand	08-31-13 00:00	31	91 Unlead E10	3.53636	3.50100
3607	NuStar- NPlatte, N	P66-Unbrand	08-31-13 00:00	36	89 Clr Unleaded	3.45657	3.42200
3607	NuStar- NPlatte, N	Growmark	08-31-13 00:00	37	89 Unl E10	3.03909	3.00870
3607	NuStar- NPlatte, N	P66-Unbrand	08-31-13 00:00	37	89 Unl E10	3.33434	3.30100
3607	NuStar- NPlatte, N	Growmark	08-31-13 00:00	49	93 Unlead E10	3.36273	3.32910
3607	NuStar- NPlatte, N	Growmark	08-31-13 00:00	61	ULS #1 Clear Diesel	3.39859	3.36460

One of the more powerful tools in setting up the format is the Expression Builder. You can use this to add and/or subtract multiple values to create a calculated number in a column. For example, you may have a user-defined column for Invoice Price that is the sum of the fuel cost, sales margin, and any discounts.

Output Setup

In order to send quotes to a customer, you need to tell the system where to send it and in what format. In Customer Maintenance, you can access the related Customer Address Master for each customer. There, you can assign a specific address group to be used for sending quotes. The address entered can include their fax number and/or their email address. Multiple email addresses can be entered, separated by semicolons.

Under Output Setup, you designate the type of output you want for each customer's quotes. For example, you may have some customers who want an email, others who need to be faxed, and still others that want both. In Output Setup, you check the options that you want for each customer and then use the appropriate address group ID, so that they program knows the email address or fax number to use. In Customer Credit, you assign each customer a Quote Format, Fax Address Group ID, and Customer Quote Group.

Generating & Sending Quotes

Quotes are automatically generated whenever you import fuel costs into the system. However, you can manually generate them by using the Generate Quotes task and entering the desired Effective Date/Time and range of customers or customer groups.

Once quotes are generated, they are sent to customers with either the Send Customer Quotes task or the Auto Send Customer Quotes task. Sending is as simple as choosing the effective date, customer quote group and type of output. Typically, you will use the "Per Setup" option which will look at the previous options for emailing and faxing based on each customer and use it to determine the output. If you want, you can use the Auto Send to schedule quotes to go out periodically (for example, once every hour). The option for suppressing duplicate quotes comes in handy here, as it will only send when the price changes.

Finally, the finished product is sent to the customer. Here is an example of mine (see above example): ©

Why you need to pay attention to

Time & Attendance

By: Ken Miller, Business Development Manager, Sierra Workforce Solutions,
Michael Flannery, Chief Information Officer, Green Valley Grocery and
Randy Pierce, Chief Financial Officer, Krist Oil

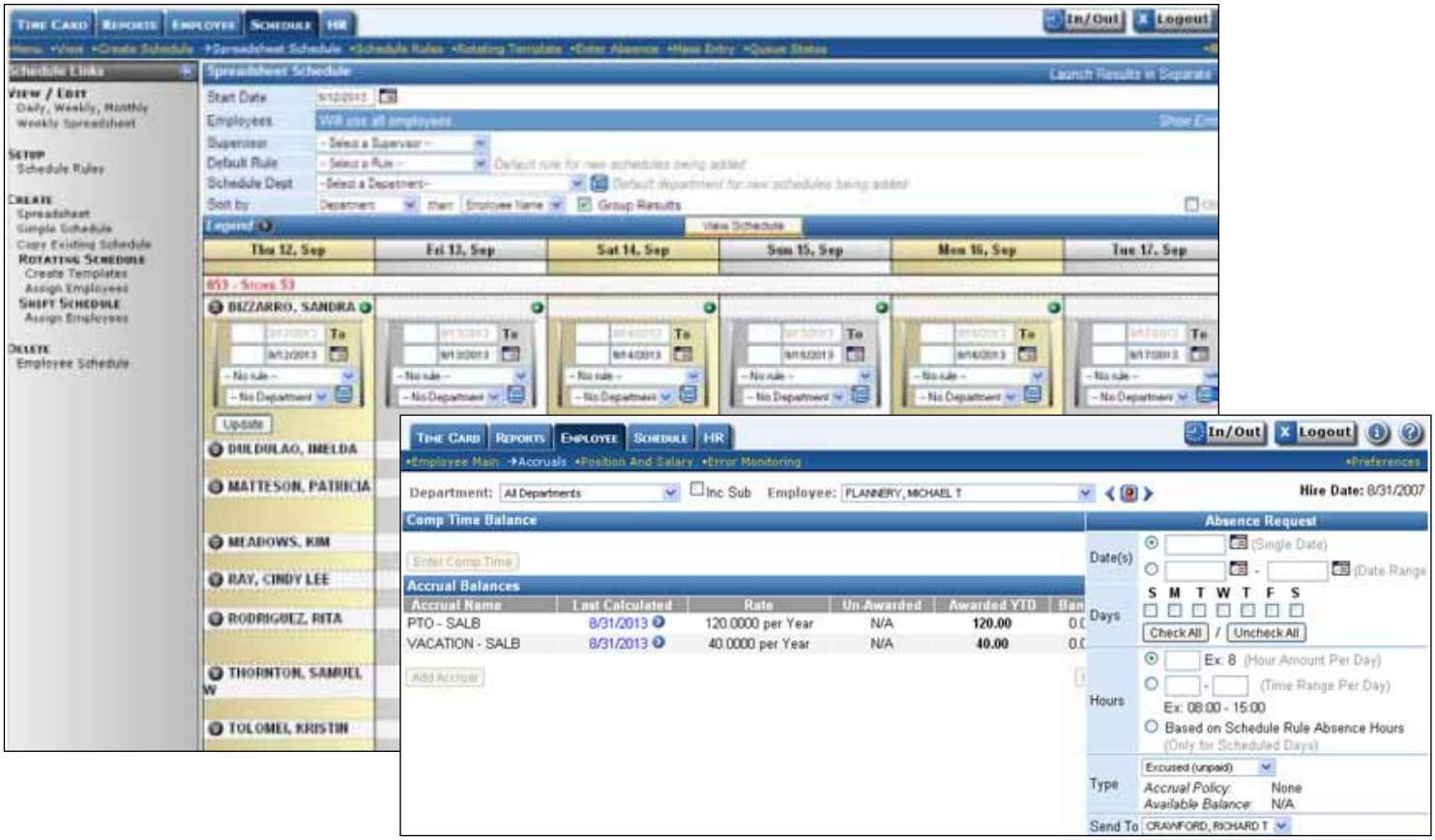
A sophisticated workforce management system is critical to saving on labor expenses and increasing employee productivity. In today's market, employee satisfaction and productivity can be a decisive difference between a company's success or failure. WFM delivers a seamless and automated system that streamlines human resources, payroll, and labor cost collection functions,

- Automating and integrating a solid time & attendance system will help you eliminate and streamline cumbersome/redundant internal processes.
- Employee absences, be they scheduled, unscheduled or PTO can account for up to 35% of a company's payroll.
- Companies that are not compliant with wage and hours laws run the risk of costly litigation.

WFM Best Practices: A Case Study

At Krist Oil, we had a couple of issues with employees that we wanted to identify and report on so we could correct.

The first issue was,we initiated a new closing process for last shift so that they would be able to close at the top of an hour and be out of there in 10 minutes. Now of course there is always the high school bus that will stop one minute before



Michael Flannery with Green Valley Grocery shared some of their daily uses of WFM:

Michael's Usage

- Daily punches
- Time verification
- Time off requests
- Accrual tracking

Store Manager Usage

- Create weekly schedules
- Verify dept / store time
- Verify individual time
- Approve time off requests

closing, and I use this as an example to cover all those legitimate reasons why the clerk would not be able to get out by 10 after. So now, after legitimate reasons there are many not so legitimate reasons that need to be corrected. For example, the clerk is not trained properly and is doing work that should be done while open, or work that need not be done at all. Or the clerk is waiting for his/her friend to pick them up. The numbers of non-legitimate reasons are many.

We ran a WFM Schedule Report called Schedule Punch Variance using the options actual punches and out punch for the past month. The WFM report had the scheduled time, the actual punch out time, and a variance. We exported the report to Excel and sorted for only scheduled punches ending with :10 because only our closing shift time ends with :10. We could further sort down to only include those exceeding the desired close time by 15 minutes. With this we then sent the report out to the supervisors to follow up with the manager to correct by training or hear the tale of the bus.

The second issue was of our managers leaving early on Friday. With the help of EPM we know our busiest time of the week is Friday 11- 5, so we want our manager there as much as possible during that time.

We also don't want our manager to cost us overtime. It is up to the manager to watch their time so no overtime is earned. They need to schedule their time and use it wisely during the week.
However, it was believed that they were dealing with a conflict of interest in that they knew if they worked early or late Monday - Thursday they had an excuse to HAVE to leave early on Friday to prevent overtime.

So we came up with a WFM report called Punch Detail where we selected the employee group that was limited to managers, for the past month, and actual time logged and exported it to Excel. The report was sorted for only Fridays and for only those that punched out prior to 2:00. We then sent the report out to the supervisors to follow up with the manager to correct by training.

WFM System Benefits Overview

A benefit of automating time and data collection is the ability to gather virtually unlimited management reports to aid in employee productivity increases. All the time data in the system can be accessed and reported on in any format desired by the user.

- Stop Buddy Punching; one hidden way you are losing money and efficiency
- Prepare for an Audit and the A.C.A.
- Quick ROI on your investment
- Eliminate double processes
- Start sharing and leveraging-using your BI to your advantage

Custom Mobile Dashboards in EPM

By: Jeff Barcome, Vice President / IT with General Equities

Before we embarked on a project to create a custom Food Bag Mobile Dashboard we had a number of objectives and questions. Perhaps you'll find some of what we considered and what we learned helpful to you and your organization as you plan your mobile EPM project.

Why a Mobile Dashboard?

- We were looking for a tool to get store level information to our District Managers.
- We wanted this information to be available on demand and allow dynamic views of the data with options to filter and drill into more detail.

Why the iPad?

- Our DM's already used iPads and liked them.
- They need the mobility the iPad offers.
- The built in Wi-Fi and cellular radios work well.
- Many apps are available for business use.
- We find them very user friendly.
- We allow some personal use, (even some gaming) to encourage use and gain experience.

Why a Dashboard?

- We wanted to consolidate as much data as possible into a single dashboard.
- Dashboards can allow a collection of great visuals of the data.
- Dashboards allow user interaction, like active filters and drill downs of the data.

Is this a DIY project?

- We found we could create decent reports, documents and visual data in EPM but had a hard time combining them into a dashboard.
- We questioned if our design would "flow" properly and have adequate performance.
- We took several "distant learning" courses offered by MicroStrategy but still struggled with the build.
- For us, the answer was to look for a consultant.

> "We wanted this information to be available on demand and allow dynamic views of the data with options to filter and drill into more detail."

Trials and tribulations…

- We took a dual approach where the consultant designed and built the dashboard and we built the data sets.
- We found this created issues where the dashboard may not have been optimally designed for our data sets, (or vice versa).
- Not being able to create or edit some schema objects limited some of the more advanced features the consultant wanted to apply.

Performance issues…

- We struggled finding that sweet spot of how much we could include in the dashboard and still have acceptable performance.
- Showing summary sales data that can be drilled down to the category, then the item level requires a lot of data, (depending on the time period).
- Would performance be adequate on a cellular connection?

Is there a return?

While this dashboard is still in beta testing with two DM's we are getting good feedback from our beta testers.

- They do report the data in the dashboard is easier to get then their other sources.
- They make fewer calls, fewer trips to the office and fewer searches thru email for this data.
- They also report the ability to go over this data with a store manager; "real time" offers a lot of benefits.

virtualization the power of

By: Chris Boebel, IT Director, Delta Sonic

William S. Burroughs said, "When you stop growing you start dying", and that has never been more evident in our industry. As IT professionals, we are constantly approached by people who want to add new services. Usually at the last minute, usually with an inadequate budget and usually with the expectation that the new service will recover if disaster strikes. Because we are there to support the business, we have to grow. We have to find ways to accommodate the needs of the business, and we need to accommodate those needs faster than the rest.

In the good old days - just a few years ago - our answer would go something like this: "I'll need some money to purchase a server. When it comes in, I will need some time to put it together, install an operating system, get it into the rack, and get your system installed. It will take a few weeks for this to happen. Oh, and if you want disaster recovery for this, I'll need two servers." The person requesting the service would then narrow their eyes and wonder, oftentimes aloud, if there wasn't a better way.

There is. It's called virtualization, and it's the technology that powers industry giants like Amazon, Netflix, and many others. Most modern server hardware is extremely powerful, and is capable of executing billions of instructions per second. However, most applications that require a server are not terribly demanding, particularly in our industry.

Imagine a server that runs backups of your data on a periodic basis. Most of the time, that server is doing nothing. Like a bored teenager, it's just sitting there idle. When the backups begin, it's still not all that busy. If you imagine further a rack full of servers, each dedicated to a single application, you can get a feel for all that extra capacity that's going unused.

A virtualization system allows the user to set up several virtual servers on one physical machine. Each of these virtual servers thinks it's running on its own hardware, and has no idea that it's really a virtual server running alongside several other machines on the same hardware. Each has its own storage, its own memory, and its own network connection. Thinking back to the example of the backup server, now things are different. The backup server would run as a virtual server. It would use only the resources it needs, and when it was idle, the physical resources could be used for other virtual machines. Instead of an idle physical server, we have a physical server that's running several virtual machines and getting more out of the resources it has.

If this was all virtualization offered, it would still be enough. Instead of having a rack full of idle servers, you have a few servers that are always busy. When someone comes to you with a need, you could provision a virtual machine for them in a very short amount of time (minutes) and have it up and running for them often before they are ready to use it. Oftentimes, you are using hardware you've already purchased. It's a win: more efficient utilization of existing hardware, the ability to create new virtual servers very quickly and the reuse of existing hardware.

However, there are other advantages to virtualization. For starters, most virtualization systems support the concept of pooling. Pooling allows you to take several physical servers and run the virtualization software on all of them. Further, the system tracks the resources available on each. When you go to create a new virtual server, the system decides what physical machine it will run on. If the system detects that one of the physical servers is having trouble, it can move the virtual machines running on it to other physical machines in the pool. All of this can happen without your users ever knowing this is taking place.

This concept can also be applied to disaster recovery: If you have a pool at site A and another at site B, the two pools can watch each other. If site A drops off the network, the resources that were running there can be brought up at site B.

> "It's a win: more efficient utilization of existing hardware, the ability to create new virtual servers very quickly and the reuse of existing hardware."

All of this comes at a cost, of course.

- Complexity: Before virtualization, it was one physical machine to one server. Now, it's several virtual machines to one server, and some additional software to manage it all.
- Learning curve: There are new concepts to get familiar with and new approaches to preparing a server that you don't see in the non-virtualization world.
- Expense: Some vendors offer free versions of their virtualization platforms, but depending on the age and resource-capacity of your hardware, investment in new physical servers might be in order.
- Planning: When you purchase physical servers with the intention of virtualization, you need to consider the future. Could you add virtual servers to this system in the future? How many? Do you need to pool your servers? Do you have disaster recovery requirements? All of this is part of the calculation.

Several vendors offer virtualization platforms, and many offer free versions of their software. EMC has VMWare, Citrix has Xen, and Microsoft has a virtualization platform as well. These free versions are real, viable alternatives to their for-a-fee brethren. Often, the free version is the same as the paid version, but does not come with support. Regardless of your comfort level with the lack of support, the free version is a great way to get your feet wet and see if this technology can work for you. Grab an old machine, install the software, and provision some virtual machines!

Finally, there are virtualization platforms as a service. The most notable of these, but certainly not the only contender, is Amazon's Web Services. For a small recurring fee (depending on the resources you need), you can create an account and provision a machine. Amazon offers a free month to try the service out. While there's a lot of hype surrounding virtualization and 'the cloud', in this case the investigation is worth it. Many major brands run on Amazon's services, including Netflix.

At this point, virtualization is a mature, exciting technology with interesting ramifications for how we build and provision our data infrastructure. It allows us to more fully utilize our resources and more quickly bring new services to life. It offers many advantages to the traditional methodology and is available from many major vendors. Finally, virtualization allows us to run services in the cloud without having to purchase any hardware at all.

References:

VMWare: http://www.vmware.com
Citrix Xen: http://www.citrix.com/products/xenserver/overview.html
Microsoft Virtualization: http://www.micrsoft.com/hyperv
Amazon Web Services: http://aws.amazon.com/free

Brand Image and Public Relations in the World of

Digital Marketing and Social Media

By: Denise Lewis, Retail Solutions Manager, The Pinnacle Corporation &
Jeannie Amerson, Advertising & Loyalty Manager, Flash Foods, Inc.

In this era of digital media and marketing have the age old principles of Marketing and Brand Management really changed? The answer is 'Yes, and No'. It's definitely more complex than ever before with multiple communication channels available, ranging from traditional print media to email, text and online options. However, the goal is still the same. You want to communicate meaningful information to your customers, give them a great consumer experience, and provide top-notch customer service in order to ultimately to win their business and their ongoing loyalty. The difference lies in how you reach this tech-savvy market, many of whom were raised on technology. It feels fundamentally different, and in some ways it is. Traditional marketing tactics are becoming less effective and digital marketing has emerged as the best way to reach the Millennial generation, those born between 1980-2000. However, the reality is that ALL consumer demographics, not just Millennial, are becoming more responsive to digital marketing.

The Millennial generation doesn't want to be marketed *to*, they want to be marketed *with*. They want conversations, not one-way messaging. That is where traditional marketing falls short, as there is little opportunity for instant communication and feedback. Social media is reinforcing this new consumer behavior, and not only among Millennials. There are a wide variety of social web site options ideally suited for this kind of conversational marketing. As you can see from this data (figure 1) from TechnoratiMedia's 2013 Digital Influence Report (http://technoratimedia.com/report/2013-dir/), Facebook and Twitter are the dominant places where companies and brands connect with customers, but a variety of other social sites also play a role, so it is important to maintain a presence on as many as you can reasonably manage.

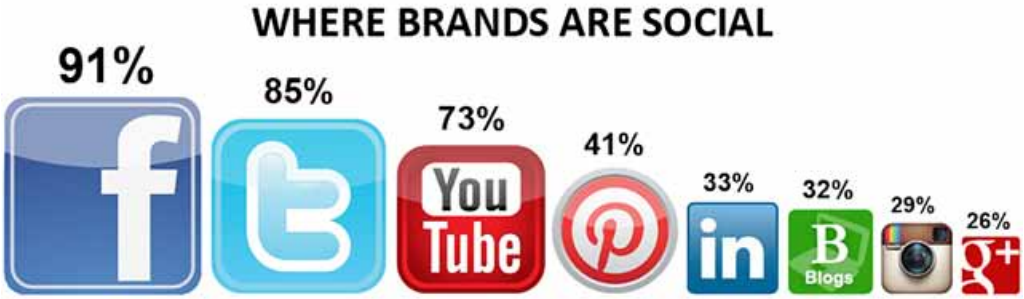


Figure 1

Implementing a digital and social media strategy includes a wide spectrum of activities. Including participating in online promotions and email campaigns, integrating instant rewards with your loyalty program, designing mobile-friendly web sites, offering mobile payments, finding the right partners to enable your overall strategy and monitoring your brand online. When it comes to finding the best ways to advertise or the most productive social sites to monitor or participate in, it is easy to get overwhelmed by the sheer volume of choices for online advertising and promotions. More research from Technoratimedia shows which sites are most popular and which have the most credibility with consumers (figure 2).

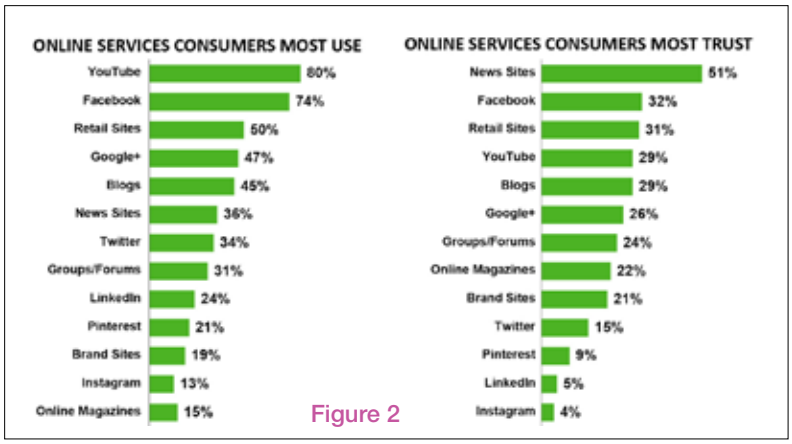


Figure 2

Along with the rise of digital marketing comes the increasing challenge of public relations and managing your brand image in this new rapid-fire environment. Digital PR is all about combining traditional public relations with promotional marketing content, social media and search engine optimization. It is the opportunity to transform static news into conversations, bypass traditional media channels and speak directly to your target audience online, often via a mobile device.

Digital marketing has some interesting impact for your business, particularly in the areas of customer service, public relations and managing your brand image. Word of mouth has always been important but in the context of social forums the importance of word of mouth, whether positive or negative, grows exponentially. Comments and opinions can go viral instantly and you have to be prepared to respond. Some studies show that 10-20% of people use social websites to complain about a product or service. The key is to monitor the social web sites, be engaged with customers, and be proactive and responsive. It is no longer enough to have someone from customer service contact them within 24 hours, this generation expects instant feedback, even if it is just to acknowledge their situation or grievance. Even an informal comment on a social web site will often go a long way toward smoothing over a tricky situation as long as it is swift and genuine.

As you enter the world of social marketing it is important to have the tools in place to effectively monitor your brand's reputation. You can set up free alerts using tools like Google alerts, Social Mention or Twitter to watch for mentions of your brand, competitor's names, industry news and important key names or terms. Use monitoring tools like Sprout Social or Crowd Booster to help you keep track of important metrics. Social media monitoring data can be used to mine new ideas, keep tabs on competitors, as well as identify and address negative press quickly and directly. Monitoring search engine rankings of news content can provide important feedback for news optimization efforts and provide insight into search traffic effectiveness.

It is clear that social media has a huge role to play in marketing your brand, and smartphones are fast becoming the dominant delivery tool. For a growing segment of consumers, mobile technology enables the way they learn, communicate and research. It has become an integral part of our lives. But how do you reach these customers who have adapted to their environment by learning not to listen? They are often non-responsive to traditional print and even email advertising, and as a group they tend to be brand agnostic. In fact they often tend to choose brands specifically because they are different than their parent's brands. The good news and bad news is they are open to trying new brands so are receptive to switching, which only means as easily as you can win them you can lose them.
An IBM study (http://www.parature.com/ibm-ceo-study-social-media/) predicts that in the next 2-4 years social media will become the #2 customer interaction method just behind, and sometimes on par with, face-to-face interaction. We can observe this trend in our stores today where it is common to see customers who prefer to consult their smart phones for information even when there is an employee – a human being who is being paid to assist them – right there in front of them available to help.

It's difficult to communicate to a generation who knows only unbounded choice and has developed selective listening when it comes to traditional media. If you want Millennials and technically-oriented Baby Boomers to love your business and your brand, here are a few things to keep in mind:

Examine your consumer transaction experience – Speed and efficiency is a must of course, so mobile payments is a natural fit, but also look for opportunities to add aspects of entertainment and play into the transaction. Use the video capabilities of modern PIN pads or other digital signage to deliver an entertaining message at the check-out counter. This generation has a short attention span so using digital media to deliver a variety of targeted messages is more effective than traditional in-store signage.

Speak their language – Be brief and informal in your messaging. They speak in Tweets and Facebook posts so if you want to connect with them you need to have a virtual presence in these online channels and speak to them in the language that they use. And remember the previous point – keep it light and entertaining! Note - research suggests Facebook, Twitter and email promotions get better results than text messages.

Interactive feedback – Find opportunities for interaction where they can choose their own destiny – this generation wants to be in control of their choices. Use loyalty programs to give them the instant gratification they seek. Gather your customer's email or cell phone number and use it to send promotional information. Be proactive and automate the information feedback loop as much as possible.

Stay current – Nothing will hurt your brand image more with this group than appearing out of touch or outdated. They expect frequent changes in menu items and brand choices in the cooler. They expect to be able to find information about your store promotions online. They expect you to relate to them. So don't do things that make it harder for them to do business with you, like having a PO Box instead of a physical address on your company web site. Remember they can't program a PO Box into their GPS.

Get social! – Incorporate social media into your Marketing and your Customer Service practices. Develop a presence on the dominant social web sites. Monitor them. Engage your fans. Respond quickly to conversations. Keep your messages light and entertaining when possible.

Use some of these popular tools to enable your company to Go Social in various key areas of your business:

- Organization: Google Docs, DropBox
- Implementation: Hootsuite, Tweetdeck, Bufferapp
- Monitoring: Sprout social – Social Flow, Crowd Booster, Twentyfeet
- Promotions: Offer Pop, WooBox
- In-bound Marketing: Hubspot, Argyle Social ©

WHAT'S NEW IN DYNAMICS GP 2013

By: Kaye Clingan, Professional Services Consultant, The Pinnacle Corporation

There are several changes to the functionality of GP2013 in comparison to GP2010. Here are some of those differences that most clients who are currently on GP2010 or earlier will benefit from.

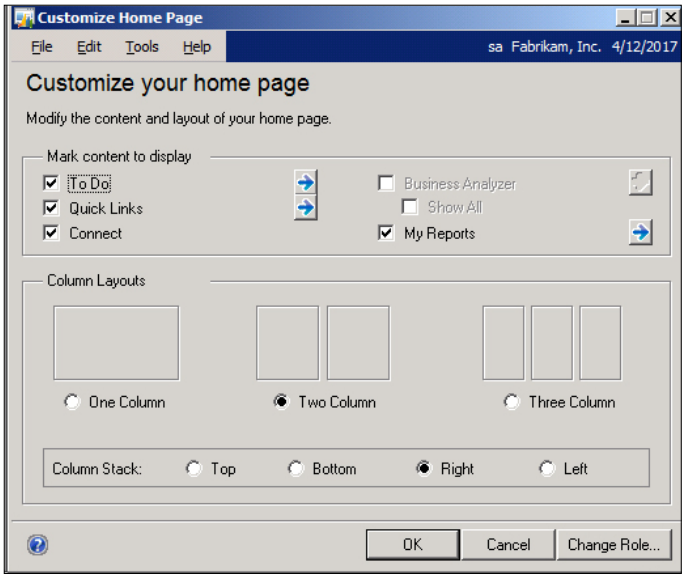


Figure A

HOME PAGE

The home page has been changed (Figure A). Microsoft Outlook has been removed. The metrics area has been replaced by the Business Analyzer area. You can move area pages around on your home page. You can use the Customize Home Page window to select the number of columns to display and the location of the columns on your home page.

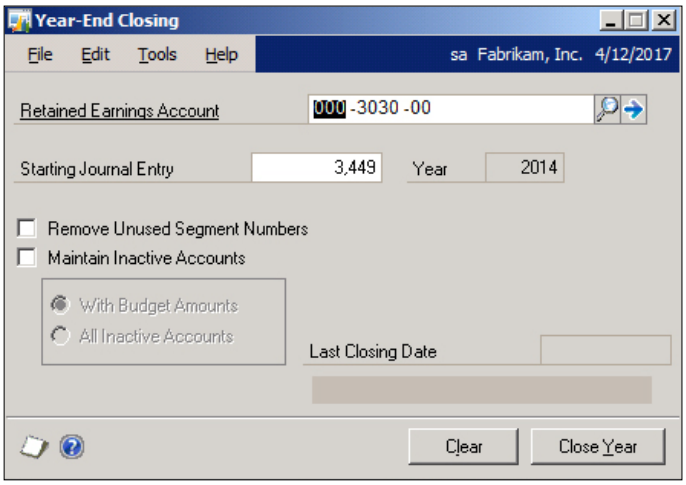


Figure C

There is a change in the Year-end process window (Figure C). In earlier versions, when you ran GL year-end process, the system would close the year out and print a report of the journal entry made. The user does not know what is processing. In GP2013, there is a progress bar and you can see what step you are on during the process. The journal entry will still print at the end of the process.

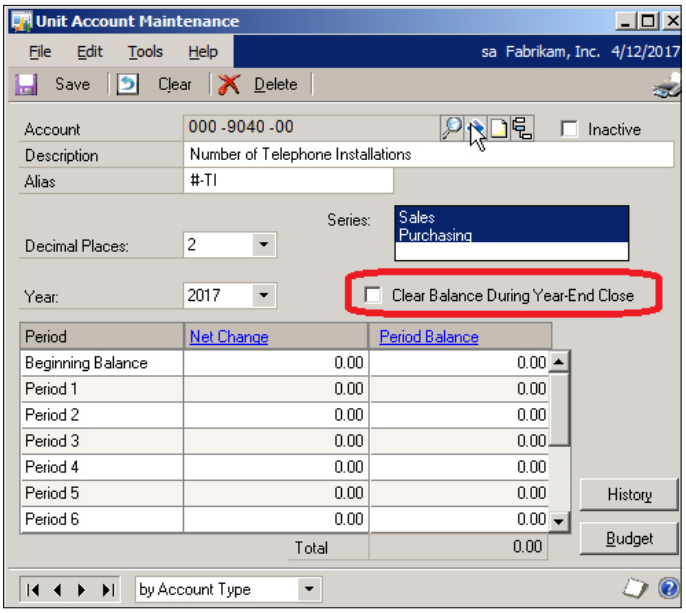


Figure B

FINANCIAL

In the Financial Series, Unit account balances can now be cleared when year-end processing is done (Figure B). In earlier versions, Gallons Sold accounts were set up as posting accounts so that when year-end is processed, these account balances zeroed out. Now you can select whether or not the unit account will be zeroed out at the end of the fiscal year.

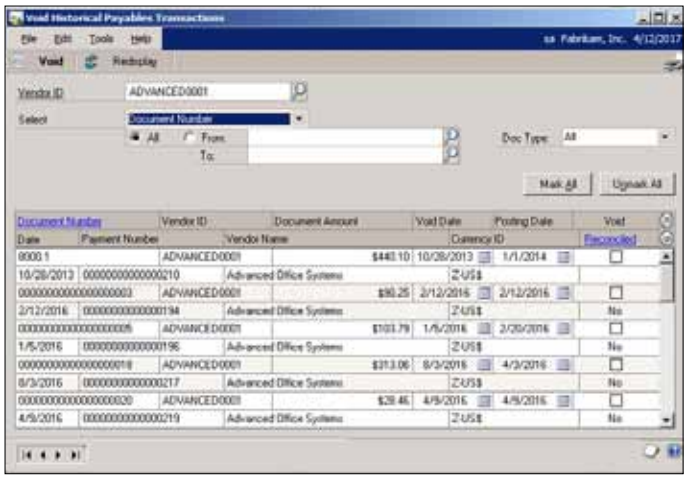


Figure D

Voiding Historical Transactions is now easier (Figure D). In earlier versions, the user had to find the historical transactions, among all historical transactions using the document number. Now you can enter the vendor ID and find the historical transactions for only that vendor.

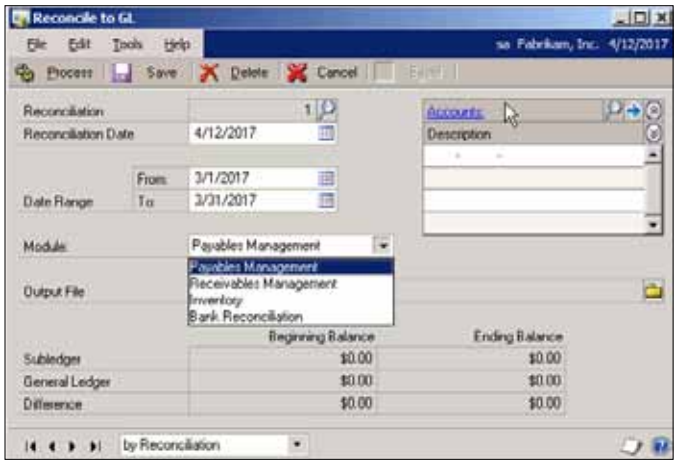


Figure E

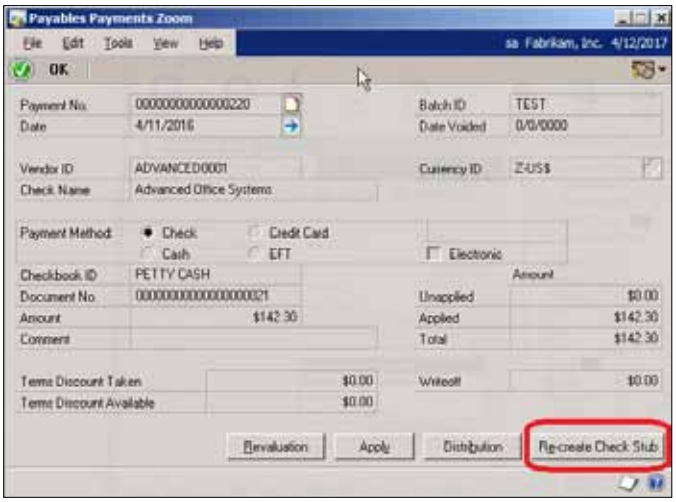


Figure F

You can use the Reconcile to GL window to generate an Excel spreadsheet that can help you match transactions in the GL with original transactions from the sub-ledgers (Figure E).
In GP2010, the only options for reconciliation were Payables Management and Receivables Management. Two new Reconcile to GL processes have been added, Inventory and Bank Reconciliation. Also, in GP2013, your reconciliations can be saved.

PAYABLES MANAGEMENT

In GP2013, reprinting remittance forms and check stubs is available (Figure F).

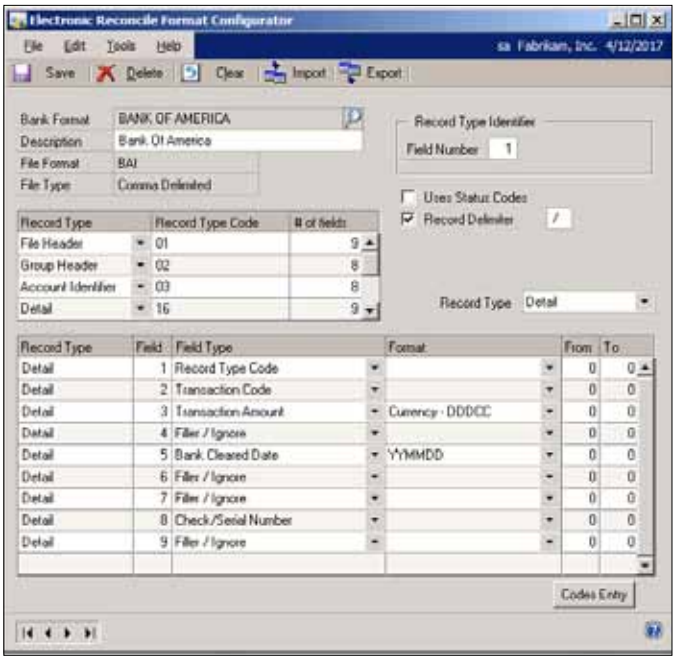


Figure G

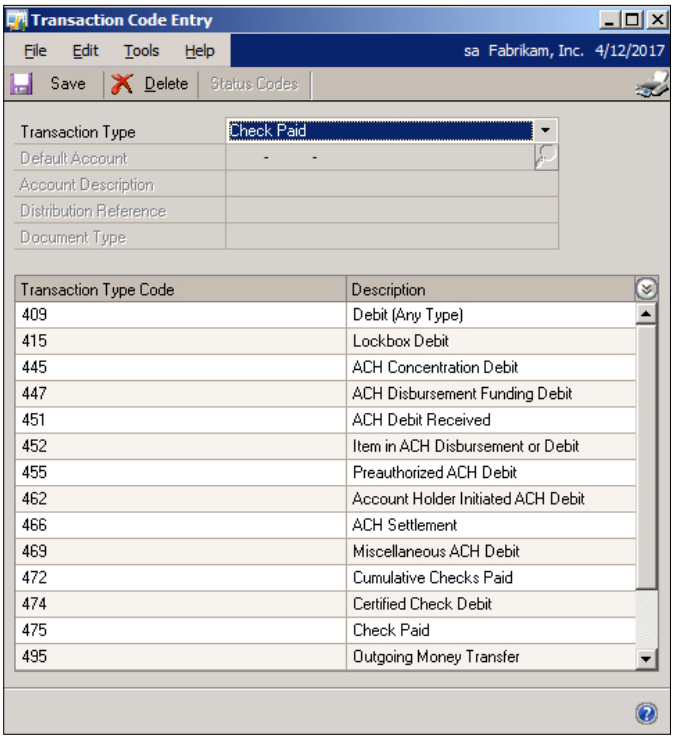


Figure H

ELECTRONIC BANKING

The BAI2 bank format has been added to Electronic Reconcile (Figure G). In earlier versions, the electronic reconcile function was limited in the number of codes that could be mapped to transactions coming from the bank. In GP2013, additional fields needed for the format have been added as well as default entries for those fields are provided.

Here's an example of the codes available for a check paid (Figure H).

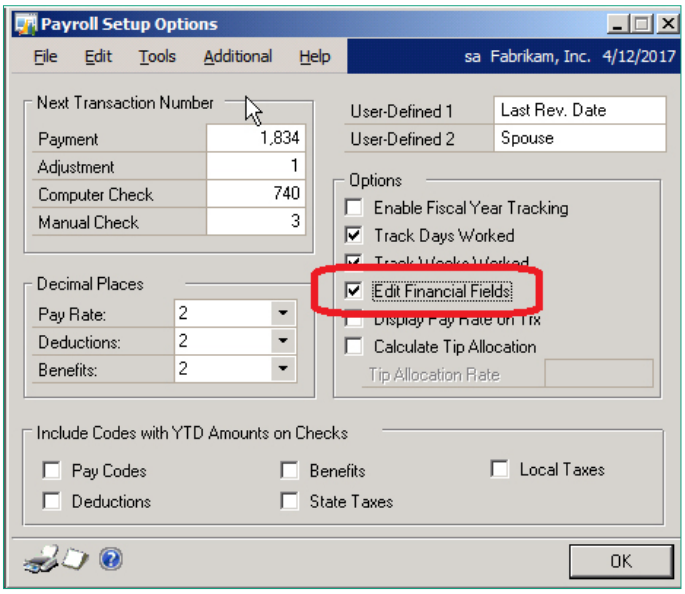


Figure I

PAYROLL

The user can set the default print options (Figure I).

For users currently using payroll, this will not be a large advantage. All payroll personnel know to change the format to checks or earning statements before printing.

There is now a Build Check File Exception Report. This report displays only the warnings and critical messages that occur during the payroll check build. In earlier versions, the Build Check file report would have to be reviewed for any warnings and critical messages. This report shows all employees.

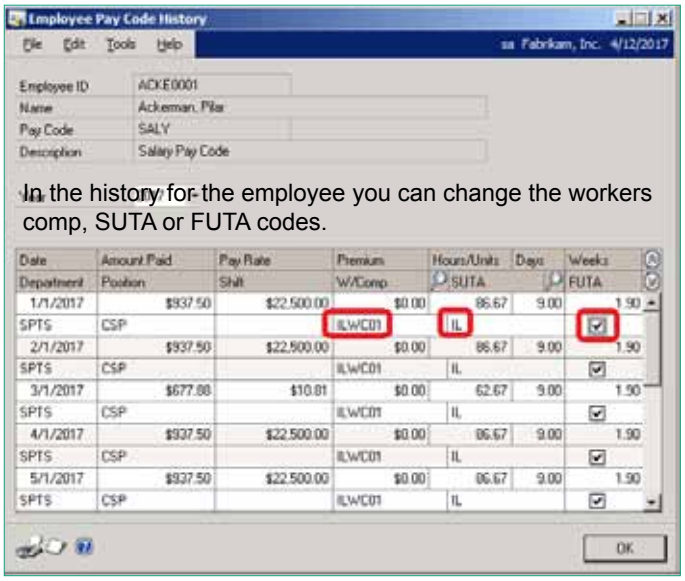


Figure J

The Build Check File Exception Report will be considerably smaller and easier to work with (Figure J).

You can now edit pay code history information for an employee. Employee code entries for Workers Comp, SUTA and FUTA can be edited in the Employee Pay Code History Window. This is beneficial if you setup the employee with incorrect codes. You must have the Edit Financial Fields marked in the Payroll setup to be able to change these fields.

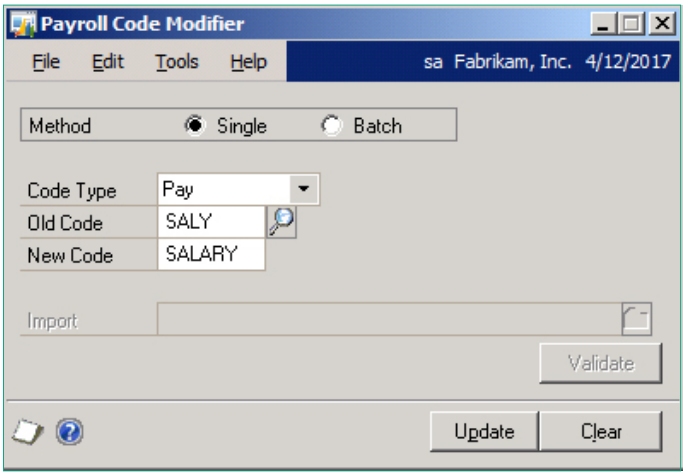


Figure K

GP2013 now has a Pay Code Modifier (Figure K). This will allow you to modify pay, benefit and/or deduction codes. You could change vacation codes to PTO code, or changing numbers to alpha characters on codes. These changes will change all history for the code you are changing.

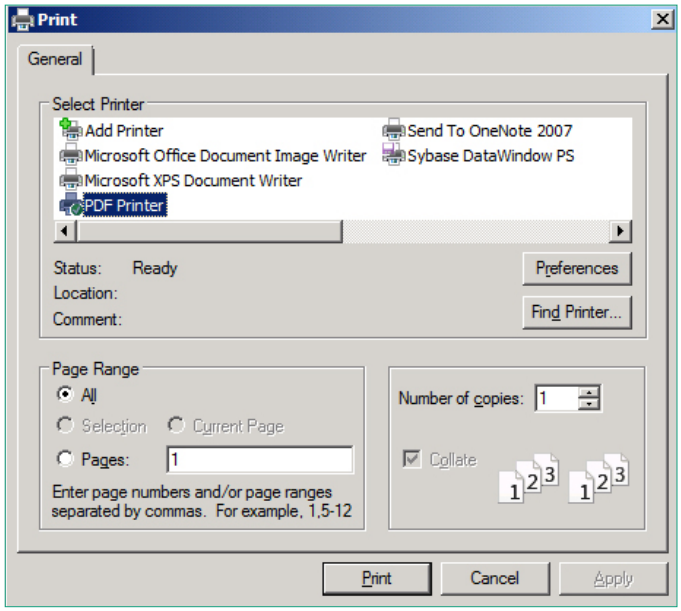


Figure L

THE BEST NEW FEATURE

In GP2013, you can choose the printer at the time of printing (Figure L). Here is the window that will appear each time you print a document ©

BY: FRANK SQUERI

FUEL 6.0 SMART

GENERAL MANAGER, SPARTAN OIL COMPANY

Fuel Smart 6.0 features a cleaner and more intuitive interface for even greater efficiency in fuel management.

With the release of Fuel Smart version 6.0, users were treated to a new interface. Instead of a columnar menu box in the middle of the screen, we now see a tree of choices on the left and a clean, white screen. As I was a beta tester of this version, one of the things I was asked to do during the recent client Summit was to make a presentation on these changes and how they affect the usability of the application. I focused on the difference between programs that make it difficult to find the desired task and those that give the user a little more help, as well as presenting the new look to those in the audience who may not have yet seen it.

Spoon Feeding vs. Hunter Gatherer

Many applications, especially older ones that were based on cryptic commands, put the user in the role of "hunter-gatherer." In order to make the program do what you want it to do, you have to seek out the various magic words from manuals, online help, friends, co-workers, and trial and error. The most extreme example of this are the command-line utilities that introduced the user to words like "attrib" and "call" and "emm386." Nothing on screen is going to tell you how to get from point A to point B.

Meanwhile, an application with a friendlier user interface "spoon feeds" the information to you via labeled tabs on display and a menu format that doesn't require any prior program knowledge. For example, you don't have to know much about Google to know how to use it. It's plain and simple and right in front of you. Key in your search term and press this button.

Efficiency by Intuitive Processes

Another thing to think about in creating a satisfying user interface is the relationship between the on-screen elements (icons, buttons, tabs, etc.) and their actual function. How logical is it? Can people with little or no computer experience figure it out? One bad example that I found was in my browser. Using Chrome, I found myself unable to determine what the heck this button in the top right corner was for…

It turns out that it's a menu to customize and control Chrome. And it tells you that if you hover over it for a little bit with your mouse. However, this shows off both of my problems with unclear functionality—a button that isn't obvious and the need to have prior knowledge that hovering over things will sometimes give you messages.

Other problems with web sites and applications I have found include poor use of space and cramming too much data on the screen. If the user's eye is not drawn directly to the important areas of the page, then that screen is most likely going to be hard to use.

Fuel Smart 6.0

The good news is that Pinnacle has kept these principles in mind when re-designing the user interface of Fuel Smart. They not only tried to correct and update the old style, but attempted to improve on the user's ability to get things done. The menu tree keeps the same organizational structure as the previous menu (Audience->Activity->Task), but it keeps it in a compact tree form on the left of the screen with an option to hide it when not in use.

The small toolbar icons with their cryptic relationship to the functions they perform have been replaced by a visible menu of functions and buttons with plain English words on them. The font has been increased, and the clean, white layout of the page keeps things straightforward and tidy.

As a result, Pinnacle has improved the usability of its flagship fuel accounting package and made it look more modern in the process. ©

Keeping a Close Watch With Loss Prevention

Jenny Bullard, Chief Information Officer, Flash Foods, Inc.

Using all our available technology and data, our Flash Foods teams have made loss prevention a standard consideration when it comes to the day to day operations of our stores. By leveraging automated solutions, prevention and oversight have delivered real reductions in loss and increased profits. To follow is a trio of examples that reflect the varied nature of loss prevention tactics. All of these examples illustrate how planning and follow-up can deliver measurable benefits to your organization.

ILI Over/Short Controls

Using MWS Item Level Inventory and EPM Analysis

Item level inventory has been one of the most impactful initiatives our company has ever undertaken. We completed rollout to all stores in 2007, and our inventory shortage has decreased by over 50% since that time.

These numbers are not limited to a certain type of store. Across our organization, stores have experienced a reduction in merchandise loss.

17	22	9/5/2013	77094	Monster LoCarb 12oz	-2.00	0.97	-1.94
18	22	9/5/2013	77145	Stride FearlessFruit	2.00	0.80	1.60
19	22	9/5/2013	77238	MikesPchLemonade10oz	1.00	1.38	1.38
20	22	9/5/2013	77239	MikesPchMargarita10	-2.00	1.38	-2.76
21	22	9/5/2013	77241	TGIF BlackberryPch10	-1.00	1.38	-1.38
22	22	9/5/2013	77257	1.49 RufflesULBcn&Ch	-1.00	1.04	-1.04
23	22	9/5/2013	77285	1.49 QuitosChilliLmCo	-1.00	0.93	-0.93
24	22	9/5/2013	77295	Marlboro NXT Box	-20.00	3.23	-64.60
25	22	9/5/2013	77316	2.00 Toms Nacho Ring	-1.00	1.44	-1.44
26	22	9/5/2013	77346	Stout 21RoyalFlshSho	1.00	1.20	1.20
27	22	9/5/2013	77382	CamelSnusFrostLarge	-1.00	2.55	-2.55
28							-274.13

Mid-Range Volume Store

The actual inventory on 9/5/2013 of Store 22, a mid-range volume store in Nashville, Ga., is $274 short. It was last inventoried on 7/25/2013. For the year 2013 has been inventoried 6 times with year to date shortage of $1,883.

788	245	9/5/2013	77026	NoNatz 2oz	-1.00	3.49	-3.49
789	245	9/5/2013	77029	GH BirthdayCakeBar	1.00	0.96	0.96
790	245	9/5/2013	77080	MonstersUTalkerCandy	-1.00	3.17	-3.17
791	245	9/5/2013	77093	Monster Orig 12oz	-1.00	0.97	-0.97
792	245	9/5/2013	77097	GatoradeLmeCucmber32	6.00	1.02	6.12
793	245	9/5/2013	77099	GatoradeGlacrChrry32	-5.00	1.02	-5.10
794	245	9/5/2013	77147	Stride IDMangoTango	-1.00	0.98	-0.98
795	245	9/5/2013	77221	Combos 7LyrDipTortll	-1.00	1.48	-1.48
796	245	9/5/2013	77263	Mentos Rainbow	-12.00	0.58	-6.96
797	245	9/5/2013	77268	DuckDynastyLEDFlashl	-1.00	4.22	-4.22
798	245	9/5/2013	77327	AlbertsWaterminWdgeP	-1.00	0.19	-0.19
799							-659.56

High Volume Store

Flash Foods high volume Fayetteville store is a perfect example of how item level inventory can keep theft down. The actual inventory on 9/5/2013 of store 245 in Fayetteville was $659 short. The store was last inventoried on 7/18/2013. For the year 2013 has been inventoried 5 times with year to date shortage of $2,014.

Analysis

Store	Inv Item		Inv Date		Begin Inv	Purch	Sales	Avg. Cost	Audit ADJ	Ending Inv
22	77295	Marlboro NXT Box	9/2/2013	Monday	61	0	1	$2.83	0	60
22	77295	Marlboro NXT Box	9/3/2013	Tuesday	60	0	1	$2.83	0	59
22	77295	Marlboro NXT Box	9/4/2013	Wednesday	59	0	1	$2.83	0	58
22	77295	Marlboro NXT Box	9/5/2013	Thursday	58	0	3	$2.83	-20	35

In EPM, Item Movement Trend Analysis shows daily perpetual inventory information on each item. This report gives supervisors and the loss prevention department the tools to research inventory shortage.

22	9/5/2013	42924	Marlboro Gold Box	19.00	4.08	77.52
22	9/5/2013	77295	Marlboro NXT Box	-20.00	2.83	-56.60

On MWS, the inventory over/short list received after an auditor has completed a count can be sorted by description. The auditor will note any items of the same that are the same brand. For instance this item was most likely scanned wrong.

Associate		Ticket Date	Event UPC	Event POS Desc	Event Ticket	Event Qty	Event Amt
Cora	LVOD	9/2/2013 Monday	9957102	Mny Ordr No EACH	4506710	1	($90.00)
Michelle	LVOD	9/8/2013 Sunday	2820017361	MrlbrMenGld EACH	4512892	1	($3.80)
GARY	RETN	9/3/2013 Tuesday	2820017359	MrlbrMenth- EACH	4507022	-1	($3.80)
sandra	LVOD	9/2/2013 Monday	2820014370	Mrlbro Gold 10PK	2881993	1	($45.69)
DEBBIE	RETN	9/4/2013 Wednesday	2820000384	Mrlbro Gold EACH	2883017	-1	($4.66)
Michelle	LVOD	9/7/2013 Saturday	2820000384	Mrlbro Gold EACH	4511900	1	($4.66)
GARY	LVOD	9/4/2013 Wednesday	2820000478	Mrlbro Slve EACH	4509027	1	($4.66)
Cora	LVOD	9/8/2013 Sunday	2820000477	Mrlbro Slve EACH	4513631	1	($4.66)
GARY	LVOD	9/6/2013 Friday	2820000565	Mrlbro SpclB ECH	4511452	1	($3.81)
GARY	RETN	9/2/2013 Monday	2820000565	Mrlbro SpclB ECH	2882149	-1	($3.81)
sandra	LVOD	9/8/2013 Sunday	2820000423	MrlbrSpBlnd EACH	2885504	1	($3.81)
Cora	LVOD	9/2/2013 Monday	1200066886	Mtn DwWhtOu EACH	4506926	1	($1.69)

EPM also provides reporting that gives supervisors and the loss prevention department insight into why we have an inventory shortage, delivering detail on returns, line voids and manager voids. This report also gives supervisors and loss prevention department the tool to filter by an item description and research inventory shortage.

Credit Card Fraud Reduction

110	1/20/2013 17:55	4184975	11	CRED	23345545313XXXXXX2107	$100.00	26.048
110	1/21/2013 6:30	4185170	6	CRED	28941414734XXXXXX1457	$100.00	26.048
110	1/21/2013 6:34	4185176	6	CRED	35317414734XXXXXX1457	$100.00	26.048
110	1/21/2013 6:38	4185178	6	CRED	35861426429XXXXXX7265	$100.00	26.048
110	1/21/2013 6:42	4185183	6	CRED	45243426429XXXXXX7265	$100.00	26.048
110	1/21/2013 9:22	4185249	12	CRED	55251986 7XXXXXX8498	$100.00	26.048
110	1/21/2013 17:27	4185675	11	CRED	17134414720XXXXXX3075	$99.70	25.971
110	1/21/2013 17:53	4185704	12	CRED	86102468027XXXXXX0438	$100.00	26.048
110	1/22/2013 1:01	4185949	12	CRED	8138426429XXXXXX7265	$100.00	26.048
110	1/22/2013 1:05	4185952	12	CRED	8803426429XXXXXX7265	$100.00	26.048

With a custom report generated from EPM, we see suspicious credit card transactions at the established pre-authorization amount. It is easy to identify multiple instances listing the same last for digits of the credit card number. The timing of transactions is also part of the alert process.

With this report, the Loss Prevention Department is able to isolate transactions and view security systems, capturing images of the person and vehicle when fraud is evident.

Figure 1: This image shows the person at the back pump area

With or video software, we can go even further to research this kind of fraud. This image shows vehicle at back pump area.

Figure 2: This camera image captures person walking into store.

A camera in the store can capture a good camera shot of the individual's face. Being able to use transaction data to isolate video is very beneficial in helping to identify the individual when reporting a theft to law enforcement.

Figure 3: A great shot of vehicle as it pulls around to leave. Notice the tank that looks like a tool box in back of truck.

The previously mentioned loss prevention efforts were put into place to address some ever present loss opportunities, merchandise and fuel theft and credit card fraud. The next area focuses on a different set of solutions: Palm POS and Loyalink.

Playing the Game – Using Loyalink to deliver winnings

State of Georgia has taken ownership of the gaming machine business in the state. Retailers that have game machines in convenient store locations have to follow strict regulations in order to stay compliant.

So why gaming machines? These machines are popular in the south. You need them in your stores if you want to stay competitive with small single store locations. These gaming machines are profitable with an estimated 2 million dollars per year in revenue. And finally, the winnings have to be redeemed in our stores, adding to the gross margin profit.

When we first put the gaming machines into the stores the process of managing and tracking the issuing and redemption of winnings was manual and vulnerable to fraud and theft. Initially, winnings were issued in $5.00 increments on paper vouchers. The vouchers had to be redeemed where they were issued and could not be redeemed for cash payouts. They had to be redeemed for store merchandise, excluding some products, such as tobacco and alcohol. The cashiers were responsible for enforcing the exclusion rules.

Loyalink and the Players Card

After some research and testing, we found that we could use the Loyalink application along with Palm to manage the winnings. This turned out to be beneficial for cashiers, marketing and accounting.

With a specially issued Flash Foods branded 'Players Card', we could assign a special range of numbers to allow us to load and redeem winnings using a Loyalink points promotion established exclusively for Players Card participants. Not only would we be able to apply and redeem winnings via this promotion, we could also limit what products could be purchased with the winnings, an important constraint for the state of Georgia. Automating the management of the game winnings with Palm and Loyalink introduced a process that was familiar to our store employees and made it a much quicker and easier process to adopt.

Finally, being able to track the activity by transaction and report on the outstanding liability of winnings is more accurate and efficient.

Using Palm POS and Loyalink Points Promo to manage winnings

- Winnings are loaded on a card utilizing an on-demand points redemption promotion unique to the Players Card range of numbers.
- When product purchased by customer – tender is done by swiping card. Any restricted products are left on transaction for a separate type of payment. Split tender is allowed.

PRICING TECHNIQUES TO INCREASE SALES

"FRANK FRITZ LOVES TO BUNDLE"

By: Bill Gattis, Professional Services Consultant, The Pinnacle Corporation

Frank Fritz loves to bundle. In case you don't know who Frank Fritz is, he is from the hit cable show American Pickers. Frank and his picking buddy Mike Wolfe travel around the United States purchasing items from people's barns, garages and houses that they can resell in their antique shops. Frank loves to put bundles together to get a better deal or to make the process of selling the items easier on the owner... He might make an offer on an old motorcycle, a gas sign and a gas pump with one bundled price to make the deal sweeter for the both the owner and Frank.

Why am I talking about Frank and bundling? Because you can offer the same type of "deals" to your customers. In the Pinnacle Pricebook you can setup items with mix match specials or combos. This can help drive traffic to specific categories or specific items, as well as gain exposure to other types of items that you sell.

Mix and match items will help increase sales. Your CSR's can use suggestive selling to point out to customers the value of purchasing an additional item. Mix and match are commonly used with package beverages and can be high profit types of items. Mix and match is a very good method of achieving an increase of receipt totals, a goal of many retailers and suppliers. Seasonal promotions are also a good way to utilize mix and match, such as 12 Packs of beer during Super Bowl week or 32 oz Gatorade during the first month of summer.

Combos are a great way to make purchases easy for the customer. Think about the way that you order lunch at McDonalds or Subway. You tell the cashier or drive thru person to make it a lunch combo or combo number one. The consumer knows exactly what he is getting and it is very simple to order. You can use the same type of method to make it easy for your customer to order the lunch combo, hot dog deal or breakfast meal deal. You can target select high profit categories like Cold Dispensed Beverages, Hot Dispensed Beverages, Roller Grill or Food Service. Throw in a bag of chips and you have a terrific lunch combo.

Both mix and match and combos are easily set up in Pricebook by assigning items to an Item Group first. Then setup either the MixNMatch Special or the Combo Special. MM uses one item group where Combos use a combination of several item groups.

Business Intelligence:

Customized Reporting for Greater Accuracy and Efficiency

By: Howard Hyche, Director of Information Technology, Double Quick, Inc.

Customizing reports makes EPM part of your business culture and speeds up adoption of Business Intelligence across the enterprise.

Using EPM to help you customize:

- Use Report Templates to start your customization.
- Don't reinvent the wheel unless necessary.
- Automate delivery of reports and notices and consider posting files to the intranet.
- Build Filters and Metrics that meet your business needs. For example, define your business week or accounting periods.
- Use Visual Insight to illustrate how something might look.

How Double Quick customized EPM and made it part of our business culture.

First we had to establish our organization's business intelligence business objectives:

- Publish relevant, actionable data
- Deliver reports in multiple formats for different users
- Don't overwhelm users with too much data
- Teach employees to create content for specific business need

Next we had to define a process that would help us achieve our objectives.

- Listen
  - » What is the business opportunity?
  - » What information is needed?
  - » How often is the information needed?
  - » Who is the audience for information?
- Analyze
  - » What data is required?
  - » Are unique metrics required?
  - » Will the user need to filter the data?
  - » Are period to period comparisons required?
- Define
  - » Audience?
  - » Report or dashboard?
  - » Grid or graph?
  - » Alert, trend, analysis?
  - » Mobile capable?
- Execute
  - » Push alerts
  - » Email reports
  - » Post content to DQ intranet
- Measure
  - » Compare to previous period
  - » Compare employees
  - » Follow trends
  - » Zero alerts is a success

Case Studies

By following the process, DQ introduced customized EPM reports and processes that have measurable improvements to the bottom line.

Credit Card Batch Closes and Charge Backs

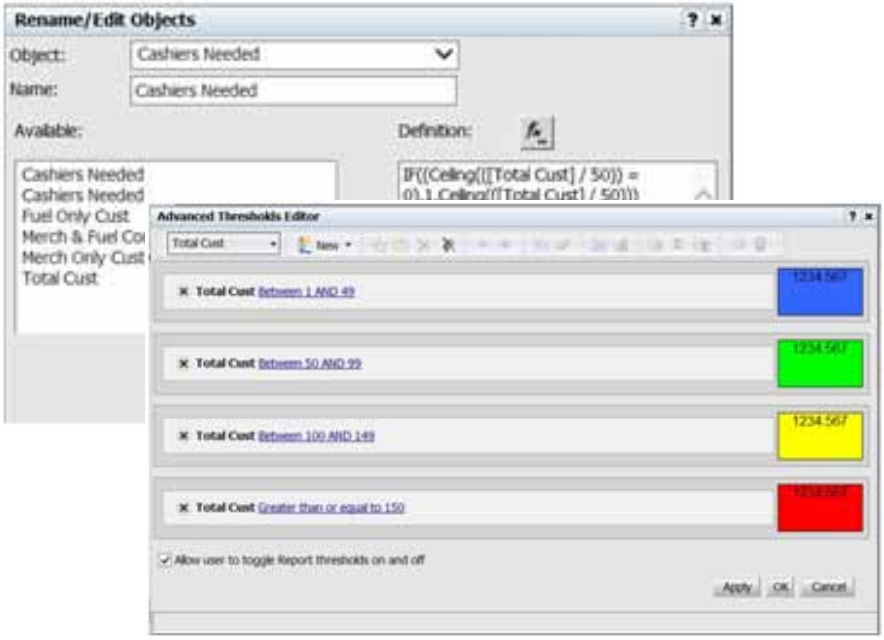
Listen – Accounting Reported Batch Close problems and possible charge backs
Analyze – Identify Occurrences and availability of data
Define Output– Write report or document
Execute – EPM sends email to our Help Desk at 8:00 each morning if Batch Denied occurred
Measure – Zero lost transactions since we implemented

Drive-Off Response Improvement

Listen – Operations wanted to identify and trend Drive-off's quickly
Analyze – What events were available? How quickly can we get the data?
Define – Design report using event. Setup alert if event occurs. Report hourly.
Execute – Alert Area Managers as drive-off occurs and trend drive-off over past weeks
Measure – Reduced total drive-offs

Reduce Labor and Improve Customer Service

Listen – We have a Strategic Plan Goal to reduce labor
Analyze – Can we use hourly customer counts to suggest cashier levels
Define – Design grid report that shows actual inside customer count by hour and suggests cashiers needed per hour
Execute – Weekly grid reports copied to each stores intranet reporting page
Measure – Labor has gone down but more importantly we feel confident in labor scheduled



Food Service Sales Improvement

Using Pinnacle EPM report as a starting point, DQ customized a report that reporting on DQ's Food Service categories, breaking the sales dollars down by Store, Category and hourly sales occurring between 10:00 and 2:00 each midday lunch period.

This report was revealing and it gave our Area Managers and Deli Managers feedback that they could act on. What was going wrong and what was going right was no longer just a theory, it was supported by data.

Listen – V.P. asked to see Food Service sales by day part
Analyze – What data is available? Can I use an existing report
Define – What period of time? What format?
Execute – Deliver daily to VP, Area Managers and Deli Managers
Measure – Record Food Sales this year

Success starts with the process cycle: Listen, Analyze, Define, Execute, Measure. Double Quick has been successful with EPM by delivering relevant information to our co-workers based on what they asked for and what they wanted to achieve. Delivering information automatically, based on thresholds or schedules, has contributed to the adoption of the solution but nothing gets buy-in like being able to show measurable improvement. ©

2013 PINNACLE SUMMIT

September 17-19 | Fort Worth

SUMMIT 2013—A RECORD YEAR!

By: Kim Duncan, Marketing Coordinator, The Pinnacle Corporation

For this year's Pinnacle Summit we traveled back to Cowtown, otherwise known as Fort Worth, Texas. The annual Pinnacle user conference was held September 17-19 at the Hilton Fort Worth, providing a touch of familiarity along with a slightly new format, which focused more on specialized track sessions, networking opportunities and success stories from Pinnacle clients.

The event provides a unique opportunity to network with people in the convenience store and petroleum fuel industries, talk face to face with Pinnacle employees as well as learn how to gain effectiveness through leveraging Pinnacle software.

As always, we entertained our attendees with some fantastic evening activities, which included some old favorites from last year. Rooftop dining at Reata and a private comedy show at Four Day Weekend was a hit with new and returning attendees. The last night guests were treated to an interactive piano show at Pete's Piano Bar, which had everyone out of their seats singing along with the classics and making unforgettable memories.

We had a record year in terms of partnerships and new client attendees. We had 16 Partner Sponsors this year, a 33% growth from 2012. We had 35 new client attendees, a 45% growth from last year. Our numbers continue to grow, and we simply could not put on the conference that we do without the support of our partners and our clients. We would like to extend our sincere thanks to our sponsors, speakers and clients for making this the best Summit yet. We look forward to seeing you next year!

In Your OWN WORDS

"This is a venue to share and learn. – Jenny Bullard, Flash Foods"

"It's fantastic. It's like you would expect a Pinnacle Summit to be; it's fun, I'm meeting a lot of knowledgeable people. The amount of knowledge we can get from each other, it's priceless. – Michael Flannery, Green Valley Grocery"

"It definitely exceeds our expectations. – Jack Dickinson, Allied Electronics, Inc."

"What I really enjoyed about the Pinnacle Summit is learning some ways that we can get the most out of the Pinnacle software. – Grant Eble, Western Oil Company

"Coming to Summit is a very valuable experience; it's well worth the investment to come down meet with the different people that run the programs in Pinnacle and find out the new enhancements to those programs so that you can more efficiently use the software to help you run your business better. – Mike Bailey, Bailey Enterprises"


SAVE-THE-DATE
PINNACLE SUMMIT 2014
DALLAS, TX
SEPT. 9-11
MORE INFO COMING SOON!
Questions? Contact Heather Smith directly at 817.795.5555 x254 or hsmith@pinncorp.com

Pinnacle Employee Spotlight

Jennifer Trafelet

Solutions Analyst

When did you join TPC?
2003

Products You Work With
Fuel Solutions Suite: Fuel Smart, Andale, Dispatcher Workstation, Fuel Customer Access and EPM 70.

About Jennifer:
Purdue University – Applied Science in Accounting
Ivy Tech State College – Applied Science in Computer Information Systems

Being born in La Porte, IN and living there forever, at 30-something I became adventurous. I packed up myself and my kids and moved south with my man to his home town. Ok so I wasn't all that adventurous, I only moved 30 minutes south and I am still in La Porte county but my zip code did change so that counts right? So my kids, I have 2 kids or as time has permitted 2 mini adults. My daughter is a senior in high school and has been accepted to Ball State University and is in hopes of being accepted into the school of art to study animation\special effects. My son is a freshman and is determined to be Purdue bound to study Aerospace Engineering and play drums in the Marching Band.

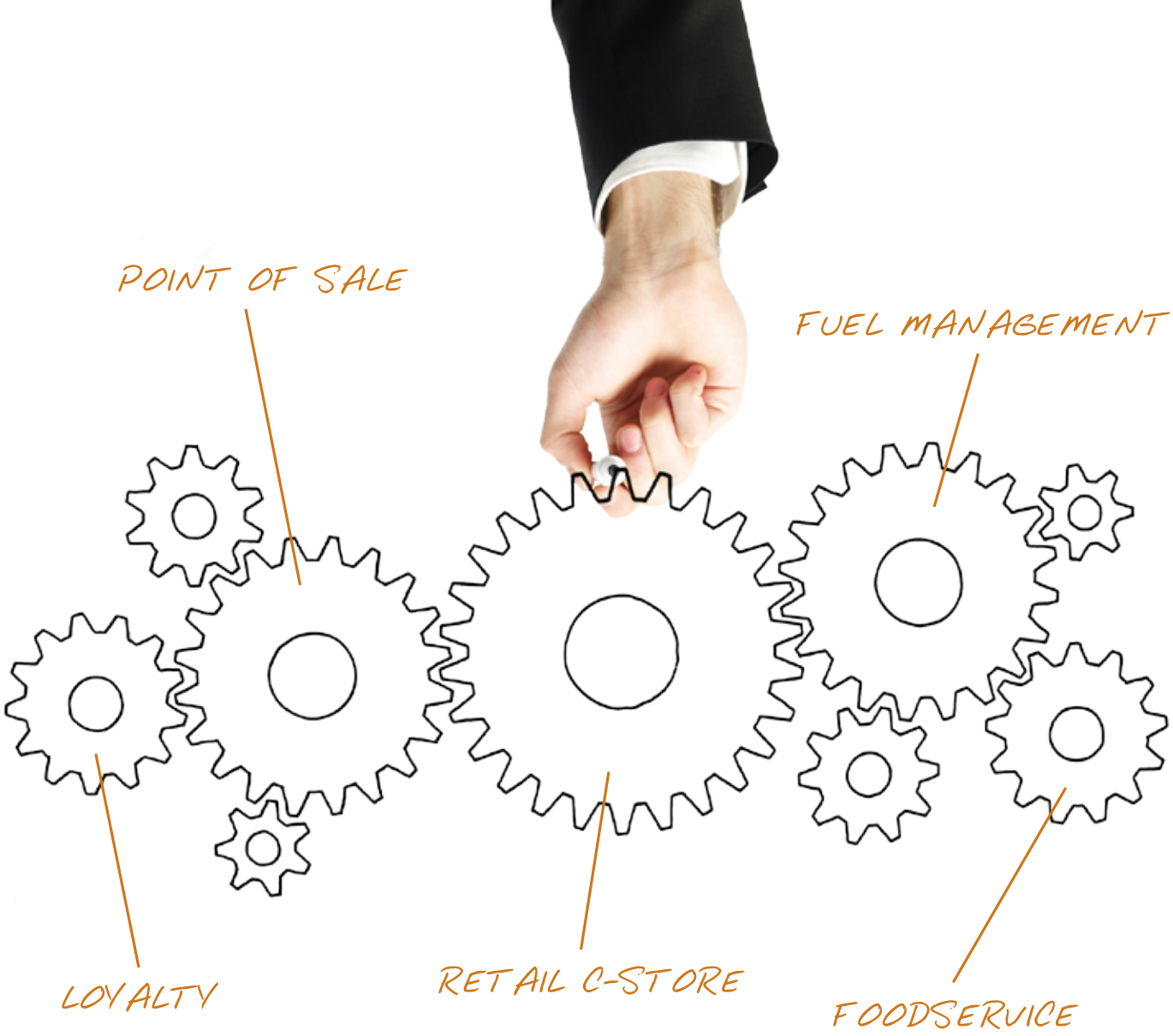
What do you do?
I work with internal team members and clients to better define requirements for enhanced features and issue resolutions. I also provide support in planning product releases.

What do you like to do when you're not at Pinnacle?
My kids seem to think that I am interested in doing dishes, laundry and telling them to clean their rooms. Truth be known…I love the outdoors when it is nice outside; I am not a cold weather kind of girl. I love to cook, a good book, bicycling, hiking and hopping on a Harley for a little relaxation and wind in my face.

Favorite Aspect of Your Job

"This is tough. I have worked with all of the Pinnacle product teams and at one point all of them at the same time. I love a challenge and the opportunity to learn new things and in some cases create new functionality. Being able to be creative is so invigorating and all in all rewarding. You start with a clean slate and you build something and watch it develop into something in which you believe will be fantastic with the help of clients and Pinnacle team members. It is really inspiring.

Don't get me wrong, while I love learning new things, writing, researching and banging my head on the desk due to a good challenge I would have to say that my favorite aspect of my job is the people that I get to work with. To me, the people that I have the opportunity to work with are what I like to call my Pinnacle family. When you work with a group that can mentally and constructively challenge you and each other every day to be great and succeed, it makes getting up and going to work so easy.®"



ONE TECHNOLOGY COMPANY. EFFICIENCY ACROSS THE BOARD.

For over two decades, The Pinnacle Corporation has been providing technology automation solutions to help convenience retailers and petroleum marketers operate with higher efficiency. With the broadest, most comprehensive suite of solutions available from any single supplier in the industry, Pinnacle enables you to streamline your entire enterprise from end to end. From retail c-store operations, to point of sale, to loyalty, foodservice management, and retail and wholesale fuel logistics, Pinnacle addresses all areas of your business with the total solution. Now that's software made convenient.

Learn how to run your business more efficiently by visiting www.pinncorp.com or calling 800.366.1173

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