

# The erspective

A Publication for the Convenience Store and Petroleum Marketing Industries

Published By:  
**Pinnacle**  
CORPORATION  
[www.pinnacorp.com](http://www.pinnacorp.com)

## One Size Doesn't Fit All

### Flexibility & Choice With Pinnacle

#### RIGHT ON THE MONEY

Saving Time and Resources  
with Andalé 3.0

Pinnacle Leads the Move  
Away from Proprietary  
Accounting Packages



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For POS Ease

## COMING UP...

**SEPT 9 -11****SUMMIT 2014**

DALLAS, TX

**OCTOBER 7-10****NACS Show - Booth #5229**

Las Vegas, NV

## FROM BOB'S PERSPECTIVE

*Change, you can count on it. It should be added to the other two things you can count on, those being death and taxes.*

*Reflecting back on Pinnacle's 25-year history, the company, the software industry and the convenience/petroleum industry have all experienced tremendous change. If you think back 25 years ago, many c-store chains were burdened with very labor intensive manual processes, Pinnacle helped lead the way in automation allowing our clients to improve efficiencies and reduce errors, thereby saving them time and money. I found Jenny Bullard's CSD article "New Technology Drives Industry Success" in the 7/17/2014 issue (short code URL: <http://goo.gl/QdLzGD>) to be a great review of the changes we have seen in the industry. And there have been a considerable number!*

*Fast forward to 2014, we have found over Pinnacle's history that "one size does not fit all" when it comes to the priority of our clients as they consider automation projects. Every company is unique, and while some are just beginning to embrace automation by implementing scanning or maintaining a price book, others are leveraging automation in more sophisticated ways in receiving, inventory management, or item level inventory. Others are focused on consumers and better understanding their customer with data analytics and customer loyalty offerings.*

*What once was a competitive advantage (basic paperwork automation) has now become a requirement to remain competitive in today's marketplace. We have found however that our clients that are having the most success, seem to do more than just automate, they manage by exception. Managing by exception means identifying the metrics that are most important to the business such as cash shortage, setting acceptable limits, and when something falls outside of those limits, aggressive review of the situation to determine the cause and move quickly toward remediation.*

*One thing is certain, business will continue to change and evolve both due to competitive pressures and compliance standards. I'm confident that Pinnacle's*

*business and that of our clients with both look quite differently 25 years from now. What used to be about automation is becoming more and more about action! That requires having accurate, timely and relevant information with which you can make better business decision. At Pinnacle, we strive to provide solutions that provide our clients with the most flexibility and control in the industry. Our goal is to enable change to occur within the convenience business model in a profitable and manageable manner. We partner with our clients to become both more efficient and more proactive as their business changes with the times. We cannot do anything about death or taxes but we can help manage change!*

*Our annual client conference is around the corner and speaking now to our clients, I look forward to seeing you in Dallas! And the NACS Show is right behind that once again back in Las Vegas! For those of you who are not yet clients, I look forward to seeing you and talking how we can remedy that in Las Vegas!*

Best,




**Robert S. Johnson**  
President  
The Pinnacle Corporation

# FROM OUR PERSPECTIVE

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## LETTER FROM THE EDITOR

*A quick glance in our world today can reveal dozens of modern technologies at work. Technology touches every aspect of life and seems to often change overnight. It can be said that faraway places are brought closer; lives are saved, productions are accelerated and the cosmos are explored all thanks to advances in modern technology. And our industry is no exception when it comes to its impact.*

*Often in the realm of convenience stores and petroleum marketers we tend to think of technology in terms of automation. How can a laborious and often lengthy process be not only automated, but be completed with greater accuracy and speed? While automation is certainly a core function and benefit from the use of technology, we as an industry are also embracing the future, the next wave of advances that offer more than just automated processes. Take our EPM™ solution for example. This business intelligence tool analyzes critical data and provides forecasting of future trends. It provides the kind of predictions that allow you to make proactive adjustments and decisions for even greater business success. Dispatcher Workstation™ is another example of predictive inventory management. This tool uses predictive analysis tools and algorithms to provide operators with gallon per hour (GPH) depletion rates and product run out (PRO) timeframes, forecasting when inventory will be exhausted. These are just two examples of powerful software solutions from Pinnacle. When combined with other retail and fuel packages, they serve as powerful tools to better move your business forward.*

*While traditional automation will always be the bread and butter of our technology needs in this unique industry; here at Pinnacle are always striving to lead the way in software advances and achievement. All while providing you with flexibility and choice in tailoring our solutions to your business needs.*

*As you consider what new and innovative technology solutions to employ in your business, there is no better opportunity than the Pinnacle Summit to learn how other clients are maximizing their software solutions. Consistently clients return year after year because technology is always changing and they're always discovering new ways to employ the software for more than just the standard functions. We hope you'll join us in Dallas next month.*

Until then! ©



Heather Smith  
Editor in Chief

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# WHAT'S NEW AT PINNACLE?

## Welcome to these new Pinnacle Clients!

- **Pete's of Erie, Inc.**
- **Petroleum Services Company, LLC.**

## Pinnacle Employees:

Pinnacle welcomes this NEW employee to our team:

**Jennifer Pinney** – Administrative Assistant

## Events:

- **Pinnacle Summit 2014** – Pinnacle's annual user conference will take place September 9-11 at the beautiful Sheraton Hotel in downtown Dallas, Texas. Visit [www.pinnacorp.com/2014](http://www.pinnacorp.com/2014) for more information. We look forward to seeing everyone in Dallas in September!

## Training & Documentation:

In the 2nd quarter of 2014, we released 40 documents to [www.pinnacorp.com](http://www.pinnacorp.com) for our clients and trained 32 students in 12 classes.

## Solution Updates:

### Andalé Version 3.0:

- NEW – Ability for drivers to be able to enter in stick readings
  - » This feature allows drivers to be able to enter in the stick readings that they have captured as part of their process in delivering a product. The stick readings are part of the import into Fuel Smart and are used in the Andalé Stick Reading Report.
- NEW – Ability to add a customized logo
  - » This feature allows for the ability to add a customized logo in the upper left hand corner of the Andalé desktop screens.
- NEW – Ability to be able to indicate that zero gallons were pulled
  - » This feature provides drivers with a way to indicated that they were unable to pull a specific product.
- NEW – Ability to be able to change the truck number
  - » This feature will allow drivers to be able to change the truck number for a specific load prior to pulling any of the products in the load.
- NEW – Ability to be able to add a product to a load

- » This feature will give drivers the ability to be able to add additional products to a load prior to pulling the last product on a load.
- NEW – Mobile Interface
  - » This feature gives drivers using mobile devices an interface that is mobile friendly and provides proper screen formatting for the device being used.
- ENHANCED – Product substitution
  - » Drivers will now be able to substitute a product on a load regardless of the number of products on the load. In previous versions, there had to be more than one product on the load in order to be able to substitute products.
- ENHANCED – Dispatch notification email and drivers screens
  - » Drivers will now be able to view the destination address of a load in the dispatch notification email as well as the driver screens in Andalé
- ENHANCED – User Interface
  - » Updated the user interface to a crisp, clean and easy to navigate user interface that falls in line with other updated interfaces within Pinnacle's software suite.

### Auditor/MWS Version 4.6:

- NEW Radiant POS-BOS Interface
  - » This new interface utilizes the PCATS NAXML format for scanning and polling end of day summary data
- NEW Post Electronic Invoices feature for Auditors
  - » This new feature was added to handle a specific business process where all invoices are entered by the home office auditing staff, providing an easier method for the auditors to process electronic invoices being received into the system. This new feature allows users to post electronic invoices by store and by date in mass from one screen.
- NEW Retail Value Inventory Correction screen
  - » For those customers who are keeping inventory @ retail by category, we have added a new feature that will allow them to make adjustments to their inventory in cases where their margins have gotten out of line or when their cost or retail values are not correct. This can sometimes happen when daily paperwork errors are not caught or are not known until later in the month and there previously was not a good way to fix the inventory. The new Retail Value Inventory Correction screen will allow you to manually adjust your inventory Cost, Retail, and Gross Margin %.
- NEW Database Purge Feature
  - » This process will purge the data associated with the business days included in the closed fiscal year selected. All data will be deleted for the range selected so customers are urged to complete a

- backup prior to running this secured feature.
- NEW Ability to Restrict Pulled Products on Bill of Lading
  - » You can now limit the Pulled Product pull down menu on the Bill of Lading screen so that it will only show those products that have been linked to the store and are valid based on the combination of Supplier/Terminals selected. This new feature is valuable for those customers who purchase products for their stores from different suppliers and helps to prevent the user from choosing a supplier not authorized for their store.
- NEW Ability to Restrict Retail/Cost Modifications on Invoice Entry
  - » You can now restrict a Vendor to not allow for modification of the Cost or Retail columns on Invoices. This feature closes the gap on a OMWS legacy invoice entry feature that allowed customers to configure for which vendors they would allow the store managers to change the cost/retail values and whether or not they want them to be able to change the cost value to a higher cost than what is in Price Book; or change the retail value to a lower retail than what is in Price Book.

#### **EPM 5.2.2:**

- Updates to database and data movement deliver more automated recovering after system reboots or invalid data errors
  - » New dependency settings ensure automatic reload of database and sync services after server reboot
  - » Database changes include updates to Tender and Paid-Out tables

#### **EPM POS Interface 2.3:**

- Enhanced data management includes updates to Sapphire and Fiscal interfaces where unsupported data format or character is managed during import so that process can be completed

#### **Palm POS™ and Payment NIMS:**

- New Journal Manager v2.7.6 supports Windows 8.1
  - » JM is compatible with Microsoft Windows 8.1 OS when running on a separate system than Palm.
- NEW CFN NIM
  - » The new CFN NIM enables Palm POS to accept a variety of popular fleet cards for payment including Mannatec, Fuelman and Fleetwide cards, both in the store and outside at the pump. ©



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For more information, visit [www.coalfire.com](http://www.coalfire.com) or call 877.224.8077





# HAPPENINGS



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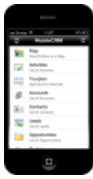
AND THE CROWD GOES WILD HAS ONE CONTESTANT CATCHES A HOT DOG





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# FLEXIBILITY & CHOICE

**PINNACLE LEADS THE MOVE AWAY FROM  
PROPRIETARY ACCOUNTING PACKAGES**

**BY: STEVE THAYER, VICE-PRESIDENT FINANCE, ENERGY NORTH GROUP & LONNIE BUERGE,  
SENIOR SOLUTIONS ENGINEER, THE PINNACLE CORPORATION**

**M**any software providers in the convenience retail and fuel management industry provide ‘captive’ general ledger applications as part of the solution. As the demands for more accurate, timely, and relevant information increase, these captive solutions often do not offer the flexibility and control over your financials you may require to make the best decisions for your business.

That was the case with The Energy North Group (ENG), who was trying to manage an expanding fuel marketing and convenience store business with a legacy retail/fuel solution which used a proprietary general ledger that no longer met their increasing demands.

As part of the due diligence process ENG evaluated 5-6 leading companies providing automation software and found the Pinnacle solution to be the right fit for them. They chose the entire Pinnacle Retail suite in addition to the Fuel Suite, and Microsoft Dynamics GP. Steve Thayer, CFO said that “one of the key features that we liked was the native integration with Microsoft desk-top products such as Excel.” which eliminates the requirement for Steve and his team to re-key data, allowing his team to be more efficient by automating the process, and eliminating the potential for miss-keyed or inaccurate information.

After an initial learning curve, ENG was also able to cut their financial report time in half. This was a welcome improvement which allowed for better management of the company. Of course, a growing business is always changing and Energy North is no exception. They have been experiencing huge growth increasing their company volume by 33% with no additional accounting personnel. Steve indicated that this was possible through the power of the Pinnacle suite and specifically the use of sub-ledgers (Auditor and Fuel Smart) to do all the daily reconciliations and leveraging the value of an open systems general ledger such as Dynamics GP.

“Pinnacle’s financial system (Dynamics GP) is powerful and robust so there is a need to get training and to learn what it is capable of,” Steve reports, “the benefits do not all come immediately. You learn and get better as you use more of the power in the entire Pinnacle suite. Steve was quick to point out that they have been growing so fast that with personnel changes their financial report window is up to 20 days but he expects to get that

back down with more training and staff familiarity with the system.

One of the features in Dynamics GP that Steve uses daily is the Smartlist, which allows for quick access to every piece of data in the general ledger and accounts payable systems. By taking advantage of Smartlists, Steve indicated that he has access “whenever I have a question or want to see all the detail.” One way that Steve uses this feature is to run a Smartlist of the detail on a financial statement and puts it onto a second screen. That way he can see a full financial statement and still see all the detail side-by-side. “This would never be possible in a smaller, proprietary system,” Steve surmised.

“Our earlier proprietary software had all canned reports; not nearly strong enough for us,” Steve indicated. “We can now get the reports we need in the right format and with the right amount of detail.” With all the industry-specific reporting in the sub-ledgers, the general ledger module can concentrate on the presentation of the financial reports allowing for the best of all options.

Pinnacle prides itself on delivering a comprehensive ERP solution to meet the specific requirements of Convenience Store Chains and Petroleum Marketers. In the 1980’s Pinnacle led the industry away from the model of writing a proprietary general accounting component. Instead, Pinnacle (TPC) designed its solution to leverage best-in-class general ledgers as part of a comprehensive retail and fuel solution. This design goes to the core of the Pinnacle philosophy; use what is already built and build when it is not. This means that TPC clients have choices in bringing the automation solutions to their business that actually fit their needs best; allowing for a more tailored approach. The client’s needs are the determining factor; no longer a one-size-fits-all mentality.

With the TPC solution, clients can choose to use whatever general accounting

component they prefer. Pinnacle markets, implements and supports Microsoft Dynamics GP as its general ledger of choice, but has clients using financial systems from SAP to Quick Books. It is the strong sub-ledgers inside of Auditor and Fuel Smart that make it possible for clients to make their own choice in retaining an existing general ledger or migrating to the Pinnacle offering (Microsoft Dynamics GP). More and more software companies have followed the Pinnacle philosophy and embrace a best-in-class model to not tie up critical development resources in areas where mainstream products have far more capabilities and R&D commitment.

With Microsoft Dynamics GP, Pinnacle clients are in a user base of over 40,000 companies world-wide providing for broad and deep development of new features every year. In addition, these new features are natively compatible with key office solutions for which Microsoft is well known. These features allow for more efficient office management and a lowering of cost per transaction. Moreover, the scope reaches well beyond GL and AP. Dynamics GP has a robust Fixed Assets, HR/Payroll, and Field Service integrated modules as well, plus hundreds of software vendors offering incremental built-in value, for example, a Commissary or Lubricants package.

ENG is continuing to grow and to expand in the New England market. They are using the Pinnacle suite to help them move forward with as little overhead as possible. Steve added, “We are still learning every day but we are glad we made the switch. We could never have survived without the Pinnacle solution.”

If your financials are held captive by your retail or fuel software provider, and would like to have more flexibility and control, or need data that is more timely, relevant and accurate to run your business, contact us at 817-795-5555 ext. 270 or at [contactus@pinnccorp.com](mailto:contactus@pinnccorp.com) ©





# The Power to Choose

## Spanning Far Beyond Product Strategy...

By: Drew Mize, Chief Operating Officer, The Pinnacle Corporation

**N**ot unlike the last issue of *The Perspective*, this edition focuses on Pinnacle's mission to provide flexibility of choice to our market and our clients. This mission expands throughout every element of our business, and while some clients desire a straight forward/cookie cutter type approach to their new technology implementations, the vast majority demands a technology partner that will adapt as closely to their overall business strategies and operational goals.

Pinnacle's clients run the gamut in terms of their use of the implemented technology solutions we make available to the

market. Most clients use several of the 25+ products we deliver to our market, some just a few, while zero clients use 100% of our solutions (although several come very close). We firmly believe in providing our clients the power to choose only those products they need from us. We provide a solid structure for the implementation of any combination of our products but ultimately don't endorse a strategy that requires a client eliminate existing technologies in order to implement a Pinnacle solution to replace a legacy system they've outgrown or no longer meets the need. This strategy often results in a client using a Pinnacle solution(s) interfaced to competitive systems on a partnership

basis. As always, our mission remains to give our clients the power to choose so we are happy to partner with those same technology suppliers that we compete against.

There is no question that a holistic, end-to-end enterprise system offers its benefits, and we can certainly provide that if needed; but, in the majority of cases our clients are either not immediately willing or not able to go with an all-or-nothing complete technology rip and replace. Our market is a much different place than it's been in the past; many operators run several lines of business, and in many cases a single end to end solution may not handle some of those lines or specific business needs.

For new product implementations, scheduling, and training we adapt to client needs and do not believe in forcing clients into a standardized practice. While we have methodical options for clients to choose from, we offer a wide range of choice for clients to minimize or maximize the amount of resources required to put a new Pinnacle solution in place. As part of the boarding process we offer training in Pinnacle's corporate office, which we highly recommend. We believe this option provides the most effective experience for clients and allows unmatched one-on-one interaction opportunities with the entire organization. However we also offer online training or on-site training options. Every organization is different, and the amount of resource time clients can devote to the process varies and we adjust to those needs.

Networking options and the widespread availability of bandwidth have eliminated the obstacles associated with physical location of technologies. We've seen clients make moves to and from self-hosting their technologies within their own walls and utilizing local or non-local data centers. Our clients have looked to us to offer hosting options for the solutions we provide, and for that reason it's been a focus in recent years. Physically locate the technology within your own walls, at a local data center, or Pinnacle offers hosting at our data center in Dallas. Regardless we have service options to meet any need.

Flexibility in technology investment options has also become a large part of our business in recent years. There's a continually growing trend towards SaaS (month to month rental) options vs. a traditional (one-time) perpetual license fee. Another option we provide our clients, the flexibility of choice.

At Pinnacle we strive to offer flexibility in choice, spanning the entire business process; not only across our product lines. We will continue to evolve these options and adapt to market needs and demands. And we and look forward to continued streamlining of our business to be in alignment with each and every client with which do business.

If your company needs more flexibility across the board, from forecourt to financials, contact us at 817-795-5555 ext. 287 or at [contactus@pinncorp.com](mailto:contactus@pinncorp.com). ©



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and [HeartlandSmartLink.com](http://HeartlandSmartLink.com)

# Heartland



# RIGHT ON THE MONEY

**Saving Time and Resources with Andalé 3.0**

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By: Scott Fongers, Dispatch and Logistics Specialist, Wesco Inc. &  
Jennifer Trafelet, Fuel Solutions Product Manager, The Pinnacle Corporation



**S**ome might say the fuel industry is as demanding as a toddler going through the terrible 2's. Whether they are dealing with high volume, outages, or logistics nightmares—when they need something, they need it now—no matter if it's day or night.

### **Wesco, Inc. fuel demand challenges:**

At Wesco, Inc., our trucks are on the road 24/7 and no matter how well we plan—fuel demands can and do change. Often times we would struggle with mid-shift fuel demand changes, in which drivers cannot respond to—primarily due to not having a dispatcher available 24/7. A few examples of demand changes would be:

- Having to add a product that had more sales than anticipated when dispatched
- Having to cancel an item that was dispatched due to lack of sales or terminal outages of product
- Having drivers switching trucks due to maintenance or longer shifts by day drivers
- Sending Andalé dispatch notifications to common carriers and then having to send additional address information

Unfortunately, these issues do not stop with the driver. If, or 'when' one of the fore mentioned circumstances occur, the driver will have had to return the paperwork to the office for someone to manually correct and then enter into the system, adding considerable time and effort to the process.

Another challenge was our monthly reporting information. When a driver was required to switch trucks the change was not being captured in the system. This would cause both the driver and truck performance numbers to be incorrect. Add all of this to the task of entering before and after stick readings along with water levels and you begin to ask yourself, "Is this worth all of the time and money?"

### **How the fuel demand challenges impacted business operations:**

We've all heard that "time is money" and this is the reason why Wesco implemented Andalé; to save time... and ultimately save money. Andalé was the answer for moving driver information back to the home office in a matter of minutes, thus allowing for faster billing of customer invoices and less strain on our accounting staff. Andalé also reduced the number of potential error points by training nine drivers to enter the billing information instead of relying on more than 100 managers and assistant managers performing this task. When drivers are unable to complete their tasks within Andalé, additional work is brought back to the office and there are delays in the billing process.

### **Pinnacle's answer to these challenges**

The Pinnacle Corporation is dedicated to listening to clients, taking on challenges and providing the best solution that meets all business operations. When approached by clients who were struggling to meet the ever changing fuel demands, at all hours of the day, in the most time and cost effective manner, Pinnacle accepted this challenge. Pinnacle answered this challenge with Andalé v3.0. While Andalé v3.0 has several key enhancements, the primary focus was on the driver's functionality. Andalé v3.0 provides flexibility for drivers to be able to answer and respond to changing fuel demands.

### **How does Andalé v3.0 address these challenges for Wesco?**

Andalé v3.0 allows our driver's to be more flexible and have more control over their loads. The ability to change truck numbers, add products, remove

products by indicating zero gallons pulled, along with the ability to add before and after stick readings and water readings, saves us time and allows for more accurate reporting. All of this of course leads to a better bottom line!

In addition with Andalé v3.0, there is no need to send additional address information as the location now appears on the hand held device eliminating the guesswork for where the load is headed. And perhaps best of all, we no longer have to dread viewing monthly reporting documents, and wonder if the information is accurate or not.

I recall a debate in an Advisory Council meetings whether companies should allow drivers the ability to make such changes; and in some circumstances perhaps you shouldn't, but that's the great thing about these features; they provide you with the flexibility and control to do what is best for your business. Certainly there are items Wesco does not want a driver to decide on. Questions such as which terminal to pull from or which delivery site to go to. Like most companies there are procedural guidelines that are set in place, but for Wesco, it provides us the flexibility we need to respond to situations as they arise, without requiring us to have a dispatcher available 24x7. For those out there who still haven't embraced the benefits of saving time and money that Andalé brings in so many ways, don't hesitate to get started.

If you are having issues with your fuel supply automation and would like to have more flexibility and control, or need data that is more timely, relevant and accurate to run your business, contact us at 817-795-5555 ext. 287 or at [contactus@pinncorp.com](mailto:contactus@pinncorp.com). ©



If you have been evaluating your loyalty options lately you probably noticed that there are no shortage of loyalty marketers trying to win your business. If anything, the number of solution providers keeps growing—some with specialized niches, others with co-branding opportunities, all with a promise to increase your customer satisfaction by offering rewards to your frequent shoppers.

#### ***Payment Driven Loyalty***

You also may have noticed everyone from your major oil brand to your payment processor to your gift card vendor has an angle on loyalty these days. That's because the two worlds of payments and customer rewards programs are becoming increasingly mixed, resulting in more



# HAVE YOUR CAKE & EAT IT TOO!

Have the Best of Both Worlds With Palm Integrated Loyalty

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By: Denise Lewis, Retail Solutions Product Manager, The Pinnacle Corporation

choices than ever before to leverage loyalty in your stores. Most major oil brands offer a loyalty program supported by their payment network. These programs typically emphasize some kind of branded rewards program featuring a fuel roll back program. Pinnacle Palm's major oil branded NIMs either already support, or are in development to support, many of these programs.

### **Coalition Loyalty**

A large number of programs emerging in the market are considered coalition loyalty programs. They typically offer customers the opportunity to earn and redeem rewards across a network of retail outlets. In the petroleum c-store market the most common coalition programs are grocer programs where a grocery chain forms an alliance with one or more c-store chains to earn and redeem rewards across the entire network of stores. Pinnacle Palm supports two partner NIMs, Fuel Partner NIM and Loyalty Partner NIM, that enable interfaces to this popular group of loyalty marketers.

### **Self-branded Loyalty**

As either a supplement or an alternative to all these kinds of programs, Pinnacle also has a suite of Loyalty solutions if you want to design and manage your own program. Palm's integration to Pinnacle Loyalty allows you to do traditional loyalty points programs, as well as extends to other functionality using the same card, such as pump authorization with Loyal Pass, ACH debit with Loyal Debit and Loyal Debit Mobile, and self-managed gift cards with Loyal Pay.

### **Palm Designed To Give You Choices**

Having your loyalty program integrated with your POS system is key to providing a seamless, consistent experience for your loyal customers. Which loyalty solution you choose largely depends on which fits best with your company's strategy. The choice is yours, but if you use Palm POS you can make your decision with confidence that your POS is flexible enough to support integration to a wide variety of loyalty marketers.

Pinnacle's POS architecture has flexibility built right in. Palm users can select the loyalty program that is right for their business, or can even combine more than one program to fit their needs. Palm's payment architecture has always allowed for more than one NIM to be implemented in the same Palm environment and that flexible architecture is what enables support for more than one loyalty program simultaneously. For instance, you may want to, or be required to, support your

**“Pinnacle's POS architecture has flexibility built right in. Palm users can select the loyalty program that is right for their business, or can even combine more than one program to fit their needs.”**

major oil brand's fuel roll back program. But you also may have your own loyalty program that you want to offer to your customers. No problem! In most cases your branded oil NIM and Loyalty NIM can happily coexist and your customers can use either program.

From a POS perspective, the rate at which loyalty marketers and programs are emerging make it challenging to keep pace with the integration required.

Fortunately, Palm's architecture and Pinnacle's well-established partner processes makes such integration projects easier on everyone, and result in making more solutions available relatively quickly.

Rather than develop a Palm interface to each loyalty marketer, Pinnacle has developed two specialty NIMs whose purpose is to enable a 3rd Party Loyalty Partner to work with Palm. The Fuel

Partner NIM (FPN) enables only fuel discounts. The Loyalty Partner NIM (LPN) supports more broad functionality and enables both fuel and merchandise discount programs. A Loyalty Partner can license Pinnacle's SDK and develop a host interface to either FPN or LPN. A typical integration project can take several weeks or several months to complete. Once the interface is certified and released, clients who have licensed Palm can also license either LPN or FPN to enable loyalty programs offered by the Loyalty Partner.

Through either the FPN or LPN, Pinnacle currently supports interfaces to the following loyalty marketers: Centego, Fueland, FIS, Kickback Rewards, and SmartEcho by Boulder Logic. Each loyalty marketer supports a number of different grocery and/or retail reward programs. As the loyalty market continues to evolve, Pinnacle is positioned to be able to support other Loyalty Marketers as our clients need them.

If you would like to have more flexibility and control in choosing a loyalty program that fits your specific needs, contact us at 817-795-5555 ext. 287 or at [contactus@pinncorp.com](mailto:contactus@pinncorp.com). ©





If someone asked you to compare the C-Store business you own today from the one you owned five, ten or even twenty years ago, do you think you would notice a few differences? Maybe you started with one store, and now you operate ten. Or think back to the items on your shelves or in your coolers. Would these look the same today?

Can you recall what was on your mind when you considered opening that first store? Or when you think about adding another today? The list probably included "How much walk-in or drive-by traffic can I expect?" "Is the location safe?" "What operating hours are profitable?" "Who are my customers?" "What will they buy?" and "Will I sell enough fuel?"

As you progressed from idea to grand opening you most likely had real estate, building and health codes, new employees, state regulators, fuel wholesalers, and vendors on your mind. After you were up and running, it's a safe bet that your new concerns became merchandise sales, employee development and retention, theft-prevention, inventory management, and fuel grade movement.

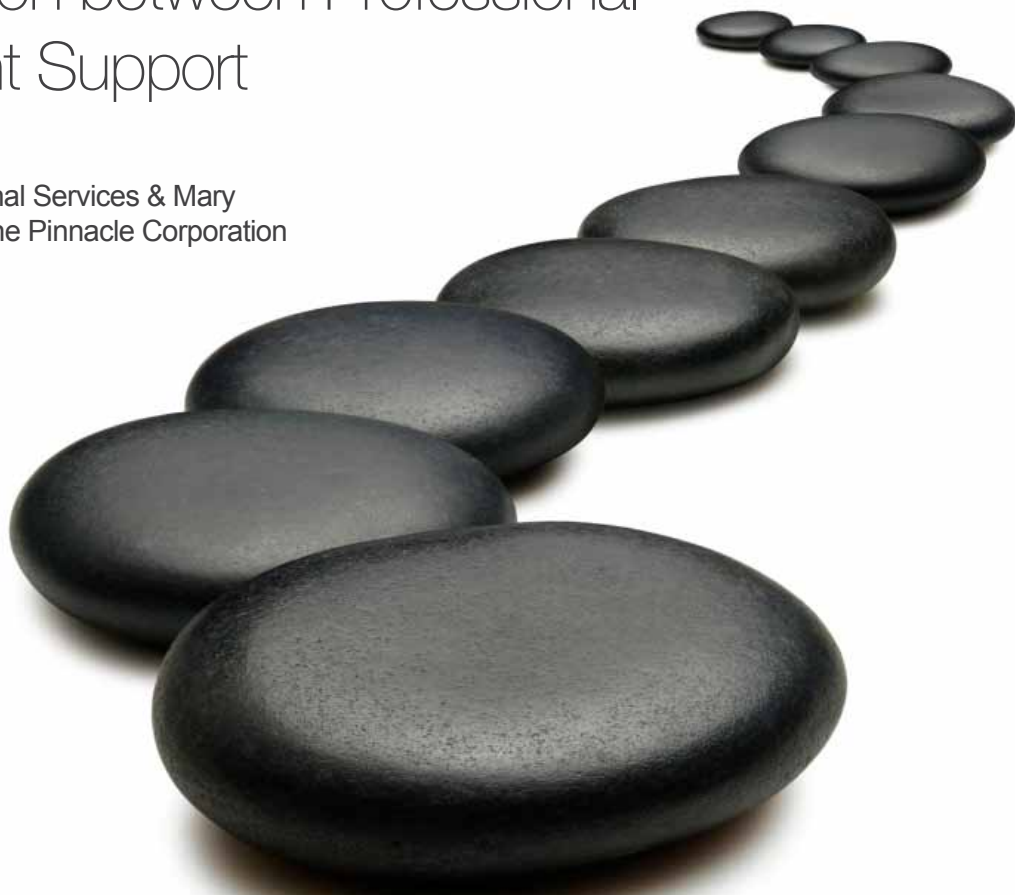
You could summarize the above by saying that your milestones for success were different at each stage of your business' lifecycle. This lifecycle started with your idea for a C-Store and the growth of your enterprise, and continued all the way through to your daily operation now.

It's no different with the software you use to run your business. The software's value to your operation progresses through a lifecycle of stages, with each stage made up of one or more milestones. Meeting these milestones keeps you on track to receive the full value of your software investment. It is also the

# Milestones Pave the Way

## Successful Transition between Professional Services and Client Support

By: Mike Vaughn, Director of Professional Services & Mary Clements, Director of Client Support, The Pinnacle Corporation



reason that established software vendors look similar in how they're organized.

Vendors that distinguish themselves demonstrate the value of why they are organized the way they are. It's all about increasing the received value of your investment as your business transitions its use of software through each stage of its lifecycle in your enterprise.

The diagram (figure 1) illustrates a lifecycle for software use that you're probably already familiar with in your C-Store operation. We use it here to show the importance of your vendor's organization and approach to help you increase the value of your software investment as you transition between the stages that make up its lifecycle.

The stages shown in figure 1 are familiar enough. A business begins its software lifecycle in pre-sales conversations with a vendor. Once the C-Store operator makes a decision to purchase, the software then needs to be implemented. After it is up and running, there will always be enhancements to make and questions to answer. New capabilities packaged as new versions become available...and so the cycle goes.

Continuing our inspection of the diagram shown in figure 1, you can see the relationship between achieving a milestone and being ready to transition from one stage in the lifecycle to the next. A closer look reveals that the quicker you transition through the stages, the quicker you'll receive more value from your software investment.

It's easy to see that the heart of your software use lifecycle is the transition from the implementation stage into operations. Why? Because once you've made this transition, you're well on your way to maximizing the value your business receives from your software purchase.

If you're an existing Pinnacle client, then you already know that transitioning from implementation to operations means a hand-off from our Professional Services group to our Client Support team. While it may appear that this hand-off is simply the last step in your software implementation, usually marked by an introductory conference call or notice to begin contacting Client Support, behind the scenes at Pinnacle it starts much earlier.

In fact, your transition to Client Support starts when our Professional Services team begins your project to get your new software up and running in your business. Sure, you're not yet contacting Client Support for questions or issues that might arise during the implementation stage, that's what your Professional Services Consultant is for. But that doesn't mean a successful transition to Client Support is not already going on behind the scenes.

It all starts with milestones that are used to measure the progress that Pinnacle is achieving toward a production implementation of your software. It's probably no surprise that Professional Services will use these same milestones as the basis for communicating and planning with Client Support for your successful transition from the Implementation to the Operations stage...the stage in which the value you receive from your investment starts to take off.

This might lead you to ask, "If milestones are the basis for how my software use transitions from implementation into operations,

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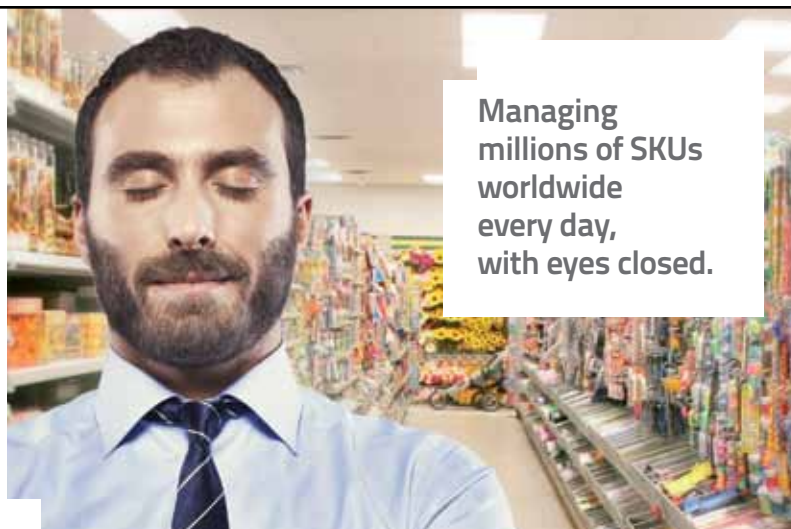
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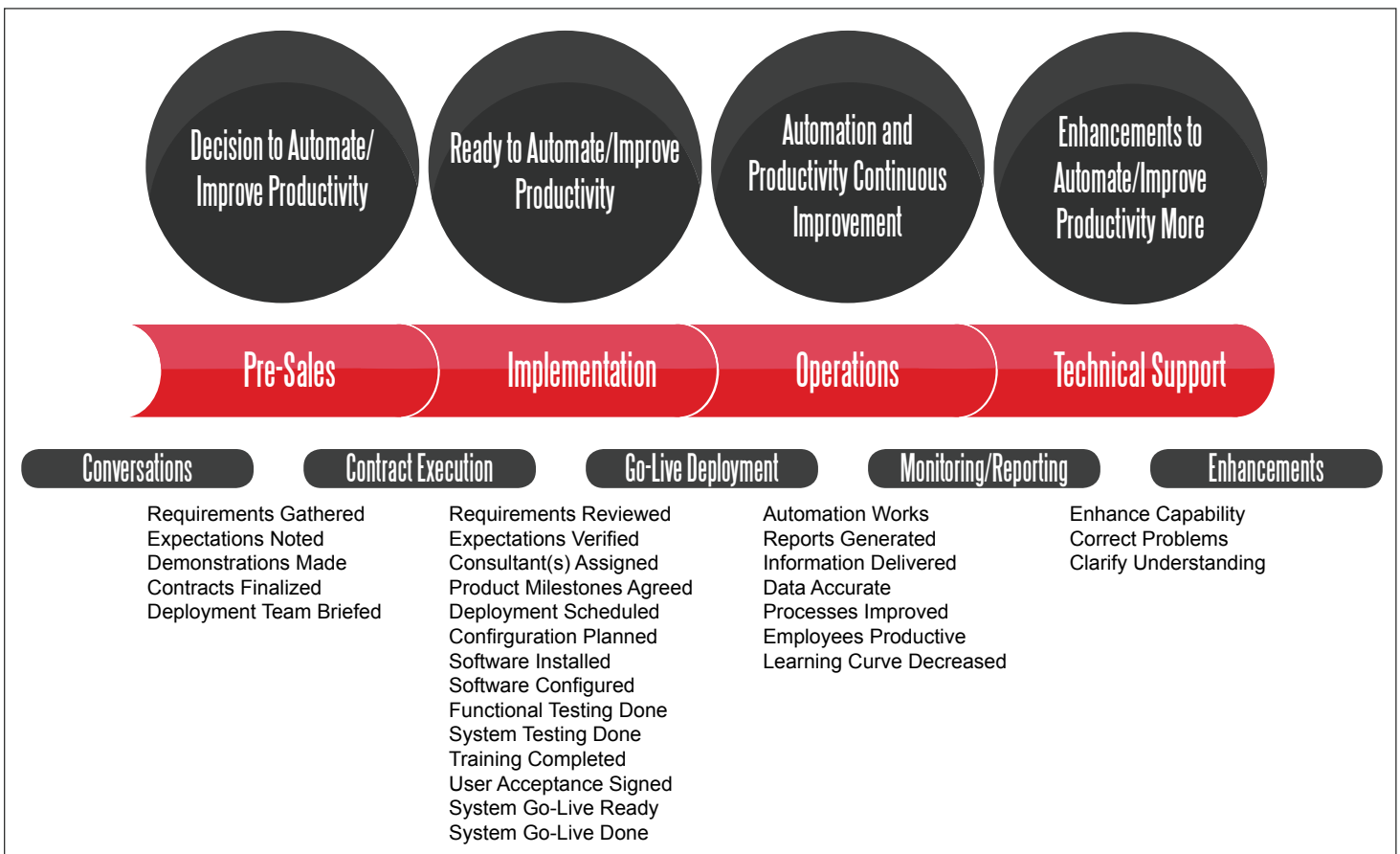


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**Figure 1: Typical lifecycle for software use**

—the stage where I start seeing its value—then what is the criteria to determine the milestones used?”

At Pinnacle, we take an approach we think you’ll agree with. The criteria are those milestones that are required to get your software up and running AND move you into the operations stage the quickest. That makes good business sense when you think about it. The sooner you start using your software as part of your daily operation, the sooner you’re going to get more familiar with it, and the sooner you’re going to learn and take advantage of all it has to offer.

Of course, that doesn’t mean that Professional Services performs a basic install of your software and then says “here it is, start using it.” Instead, Professional Services will get you up and running with the foundation you need to start using your software as quickly as possible in your business.

For example, there are those milestones in the implementation stage that simply must be achieved before you can transition into operations. Things like setting up servers, deploying the software itself, planning and building the starting configuration, verifying that all the expected functions are setup correctly, and testing connectivity and communication with other software and components. If these items weren’t taken care of first, there would be no working solution to hand over to Client Support... no software for you to operate.

Once you get past these core milestones, decisions can get fuzzy within the implementation stage. For example, do you perform one or two system tests before go-live? How many stores do you want to monitor after they’re up and running before you deploy company-wide? How much employee training and practice on functions and flows are enough?

When does readiness preparation reach a point of diminishing returns...further pushing out your return on your investment?

Milestones take away the fuzziness. Implementation success becomes clear. For example, you know going in how many stores Professional Services will assist directly to deploy...and when we’ll look over your shoulder. Store Manager training means this...Home Office training means that.

In short, milestones provide the yardstick to gauge when we’re done with implementation and when it’s time to transition.

After transition, Client Support will pick up from there, supporting you with answers to your questions and resolution of your issues that can pop up as you progress with the use of your software deeper into and across your business operation.

As you’re getting more and more out of your software investment, Client Support is there every step of the way, supporting you with value-added answers and prompt resolution of issues.

Earlier in this article we stated that vendors distinguish themselves by demonstrating why they’re organized the way they are. At Pinnacle, we know your software deployment in the implementation stage is just the beginning of your journey to reach full value of your software. You reach full value as you continue to grow its use within the operations stage of its lifecycle.

Our Professional Services exist to successfully move your software use into operations, and operations is where our Client Support lives day in and day out; working with you as you pursue the full return on your software investment. ©





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Register Now! [www.pinnaclesummit2014.com](http://www.pinnaclesummit2014.com)

By: Kim Dyer, Marketing Coordinator, The Pinnacle Corporation

**T**his year at Summit our focus or theme, if you will, is centered on the idea of evolution and change. As Tony Robbins says, "Change is inevitable, progress is optional." While we all face change on a daily basis, some struggle with the rapid advancements of technology innovations in our field. It can become difficult to keep up with the constant updates, enhancements and changes that are part of advancing technology. Here at Pinnacle, we are always striving to evolve as a company, to make our business process more efficient and to provide a better experience to our clients.

Summit is one of those areas that we are continually improving, whether it is the breakout sessions, the general session content, speakers, etc.

Much like last year, we have continued our efforts to arrange breakout sessions around solution groups: Fuel, POS, Retail, and Loyalty/BI/Price Book. This year, we have gone a step further by creating four tracks that provide a different way of breaking down the sessions. In doing so, we have made sure there is a breakout session for everyone, no matter what your product focus may be.

- What's the Best Way: Our best practices suggestions for the different topics.
- How Do I: Training focused sessions on different solutions
- Let's Fix It: Troubleshooting focused sessions that teach you to solve your own problems
- Where Do We Go from Here: Round table discussions focused on specific topics

Here are a few examples from these new track sessions:

- Get 'Em on the Go: Attracting Customers with Multiple Loyalty Applications
- How Do I Set Up Fuel Smart to Work with Andale, FCA, and DWS?
- Data not Coming in from EPM?
- Roundtable: Managing Item level and food service inventories

From the new breakout tracks that give you the flexibility and choice to choose based on your area of expertise, to our keynote and general session speakers who will focus on change and evolution, this year's Summit is sure to be the best one yet. We have continually fine-tuned our sessions, speakers and night events to bring you the best content and user experience possible. There is no better place to learn about Pinnacle products, network with other Pinnacle users and have fun than

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## 2014 Speakers



### Keynote Don Yaeger

Don is a nationally acclaimed inspirational speaker, longtime Associate Editor of Sports Illustrated and author of 24 books, eight of which have become New York Times Best-sellers. He began his career at the San Antonio (TX) Light and also worked at the

Dallas Morning News and the Florida Times-Union in Jacksonville before going to work for Sports Illustrated.

As an author, Don has written books with, among others, Hall of Fame running back Walter Payton, UCLA basketball Coach John Wooden, baseball legends John Smoltz and Tug McGraw and football stars Warrick Dunn and Michael Oher (featured in the movie *The Blind Side*). He teamed with Fox News anchor Brian Kilmeade to pen the 2013 best-seller “George Washington’s Secret Six,” a look at the citizen spy ring that helped win the Revolutionary War.

Don left Sports Illustrated in 2008 to pursue a public speaking career that has allowed him to share stories learned from the greatest winners of our generation with audiences as diverse as Fortune 10 companies to cancer survivor groups, where he shares his personal story. More than a quarter-million people have heard his discussions on “What Makes The Great Ones Great.” He has also built corporate programs on lessons from Great sporting franchises on building Cultures of Success.

Learn more at [www.donyaeger.com](http://www.donyaeger.com) or contact don at [don@donyaeger.com](mailto:don@donyaeger.com)



### Dean Lindsay

As a noted authority on harnessing human potential and creating authentic business growth, international speaker and business coach. Dean Lindsay is the best selling author of *The Progress Challenge: Working and Winning in a World of Change*,

a book that Ken Blanchard, coauthor of *The One Minute Manager*, calls - “a much needed kick in the

pants for all of us.” The book has been translated into Spanish, Polish and Chinese - where it has sold over 20,000 copies.

Spotlighted as an Outstanding Speaker by the International Association of Speakers Bureaus, Dean has served as Guest Lecturer to UCLA and University of Dallas MBA programs, as well as at the International Customer Management Institute. Dean has worked with organizations in several countries including: Spain, Poland, Turkey, Sweden and Venezuela. An active member of the Viktor Frankl Institute of Logotherapy and the American Society of Training and Development, Dean Lindsay is a featured contributor to a wide variety of business publications, including ‘Executive Travel’ and The American Management Association’s ‘Moving Ahead’ magazine.

A cum laude graduate of the University of North Texas, Dean has served on the Executive Advisory Board for UNT’s Marketing and Logistics Department. Dean is an avid runner and has completed the Stockholm Marathon in Stockholm, Sweden, and the Motorola Marathon, in Austin, Texas along with several half-marathons. Dean, his wife Lena, and their two strong and wonderfully nutty daughters, Sofia and Ella, live in Plano, Texas.



### Leroy Kelsey

Leroy Kelsey is the Director of Industry Analytics at NACS and is responsible for disseminating key industry metrics that provide NACS retail and supplier members with performance benchmarks, as well as information critical to the

industry’s advocacy efforts on payment cards, motor fuels and tobacco. Prior to NACS, he spent five years with Intel and Motorola and five years with Safeway in a variety of roles in business analytics, finance and cost control. Kelsey received a BS in industrial engineering from North Carolina State University in Raleigh and an MBA from Johns Hopkins University. He and Tracy Kelsey are the proud parents of two daughters, Avery and Kennedy. He has run with the bulls in Pamplona, Spain, but more recently enjoys quiet evenings with the family.



## *An Invitation from* --- **The 2014 Master of Ceremonies** ---



**Chris Boebel**  
**Master of Ceremonies**  
**Delta Sonic Car Wash**

This fall, The Pinnacle Corporation will once again be hosting the Pinnacle Summit. A gathering of customers, Pinnacle employees, and vendors, the Summit presents an excellent opportunity to learn about Pinnacle's products, network with peers, and learn about the trends in our industry that shape the way we do business.

Having been a regular attendee of the Summit for over a decade, I can say without hesitation that Pinnacle puts together a strong program that keeps getting stronger. Additionally, Summit brings together people from all over the country and all over the industry. This mingling of perspective and experience has been an incredible resource for me over the years. Having spoken with so many attendees over the years, I know that many of them value that interaction as well.

As your Master of Ceremonies for this year's Summit, I urge you to attend the Summit. I believe you will come away from Summit with a deeper understanding of the Pinnacle products you use and with information, advice, and best practices from your peers in the industry.

Chris Boebel  
Delta Sonic Car Wash Systems  
[ctb@deltasonicarwash.com](mailto:ctb@deltasonicarwash.com)







# The Sky's the Limit with Management by Exception

**By: Sherry Putnam, Office Manager, Lipscomb Oil Company & Tracie Nall, Retail Solutions Engineer, The Pinnacle Corporation**

Exception Management is a term that retailers have heard for quite some time; but what is it exactly? Pinnacle defines Exception Management as reporting results on data that has fallen outside of expected parameters. Let's take a look at Exception Management from the eyes of a convenience store manager or home office auditor, where what may be unusual for one location could be considered the norm for another?

## **What People Are Saying:**

Sherry Putnam, officer manager for Lipscomb Oil Company, knows this problem all too well. Putnam recognized that her accountants had a long list of items to check each day. She found that they were spending too much time looking at too much data, resulting in too many needless mistakes. "They were getting comfortable in their routine," describes Putnam. Desensitization is one of the many reasons Pinnacle's Auditor solution was appealing to her.

Pinnacle understands our clients struggle with this question and therefore, created a robust exception management tool within the Pinnacle Business Platform call Auditor, which takes the guess work out of determining data normalcy. Exception Management is designed to analyze the daily paperwork values at both the store and corporate levels

and notify users when there are values that fall outside of client selected parameters. The tool analyzes these values and specifically focuses attention to the designated areas that deserve extra attention—the exceptions.

According to Putnam she was ready to be in the 21st century; anxious to leverage the computing power of Auditor and all of its' features – like Exception Management. Sherry's team has now been using Auditor since early 2011 and has been able to leverage the power of Exception Management since day one. She explains, "After doing the same routine for months and even years, they (the store managers and auditors) get comfortable and that is where you end up with a lot of mistakes; this tool is a double check for them." Exception Management frees up Putnam's staff to focus on the real issues with paperwork; it empowers them to actually be auditors and not bookkeepers. Putnam concludes, "We are not accurate with pencil and paper; we need computers and tools like Exception Management to help us along. It is our safety net."

## **The Results:**

After implementing Pinnacle's Auditor solution, Lipscomb Oil was able to accomplish more with less. With tools like Exception Management, each accountant is able to process

Accounting Manager

Integration Manager

Manager Workstation

POS Manager

SIS Manager

System Manager

About

Information Manager

Exception Management

TPC Demo | Preferences | Logout

Select a Business Day

Store	Description	Date	Status	Exceptions	Action
15	#15 Horizons	2/5/2013	Closed		Select
15	#15 Horizons	2/6/2013	Closed		Select
15	#15 Horizons	2/7/2013	Open	3(1 approved)	Select
17	#17 Horizons	2/5/2013	Closed	1(0 approved)	Select
17	#17 Horizons	2/6/2013	Closed	1(0 approved)	Select

First Previous 1 2 3 4 5 Next Last

Exception Detail

Store: 15 - #15 Horizons

Business Day: Feb 7, 2013

Status: Open

☒ Approved
 ☐ Unapproved
 

☐ Final
 ☐ MWS
 ☒ Both

Category	Element	Exception Type	Exception Value	Exception Status	Approved Date/Time	Approved By
Sales and Cash	MWS	Unapproved	Block	Element: Cash Over/Short MWS Currency: 40.00-The value is outside of the acceptable range		
Fuel	MWS	Unapproved	Warn	Current Over/Short: 9-93PrEh MWS -2,241.00-The value is outside of the acceptable range		
		Approved	Warn	Current Over/Short: 7-89NLEh MWS -3,168.00-The value is outside of the acceptable range Reason: Delivery entered on wrong paperwork day - Christopher Nicka		

Report ID: Exception

Exception Report

7/2/2014 2:31 PM

Please select a profile: New Profile Save Remove

Store Grouping ID: CARWASHSTRS  
DELI  
FUELSTORES

Store Number: 6  
10  
13

Include Reason ☒

Exception Area: 

Category: Element  
Fuel Delivery Detail  
Fuel Delivery Header

Stage: 

CURRENT  
MWS  
FINAL  
BOTH

Business Date(mm/dd/yyyy) >= 02/05/2013 and <= 02/07/2013 View By: Store Submit

Exceptions

Store: 15 - #15 Horizons

Entity: Element	Business Date: 02/07/2013	Exception Entity	B/W	Exception Type	Valid Exception	Exception Value	Exception Status	Approved Date/Time	Approved By
MWS		Element: Cash Over/Short - MWS Currency	Block	The value is outside of the acceptable range	-10 : 10	40.00	Unapproved		Unavailable

Entity: Fuel Inventory

Business Date: 02/07/2013	Exception Entity	B/W	Exception Type	Valid Exception	Exception Value	Exception Status	Approved Date/Time	Approved By
MWS	Current Over/Short: 9-93PrEh - MWS	Warn	The value is outside of the acceptable range	-100 : 100	-2,241.00	Unapproved		Unavailable
MWS	Current Over/Short: 7-89NLEh - MWS	Warn	The value is outside of the acceptable range	-100 : 100	-3,168.00	Approved	07/02/2014 02:32:34	Demo, TPC

Reason for Approval

Store Number: 15	Area: Fuel Inventory	Approved Date/Time	Comment
Stage: MWS - Current Over/Short: 7-89NLEh - MWS		07/02/2014 02:32:34	Delivery entered on wrong paperwork day - Christopher Nicka

Restricted Mode: false

more paperwork more quickly, with fewer mistakes, which results in more timely, accurate and relevant financials. On average, the accountants are able to complete store paperwork within 48 hours versus being behind by days or even weeks. With these results, Putnam's team is taking on more responsibilities while having confidence in their accounting analysis.

### How It Works:

Pinnacle's Exception Management tool is a rules based component, which allows users to create exception rules by store, store grouping or across the organization. It has the flexibility to manage virtually every piece of data within a paperwork day. Users can create exception rules on values such as Fuel and Inventory sales, margins, and O/S and the system does the rest. Each paperwork day is automatically checked and, if an exception exists, the users will be alerted to make corrections. The users must then correct the exception data. If the user is unauthorized to make the correction, specific staff approval is required, as well as a documented reason as to why the value falls outside of the normal range. Finally, all exception-level data is available at management's fingertips for reporting and further trend analysis.

### Where Do I Start?

From an implementation point of view, Pinnacle recommends you begin with a few basic metrics, in order to

familiarize yourself with the tool and its functionality. Cash Overage/Shortage is a good place to start. We recommend setting up limits for this metric and testing it a few locations to determine operational and business requirements for managing by exception. From there, the sky's the limit; we encourage companies' to continue to identify and add metrics/limits that are most relevant to their organization.

Still not convinced this is the right direction for your organization? You can of course continue to audit paperwork without using the exception management rules to guide your team; but why would you? The tool is there, easy to implement; so why not leverage the technology? Let the Pinnacle tools be YOUR safety net, and join other customers like Lipscomb Oil Company and take your auditing to the next level. Free up your store managers and accountants to solely focus their time on the exceptions. Your results will be more accurate data and quicker financials. What will you do with all your new found time?

One final thought: "Do you manage by exception or is uncertainty managing you?"

For more information on how you could take advantage of exception-based accounting; check out our website [www.pinnacorp.com](http://www.pinnacorp.com) or contact our Pinnacle Business Platform Client Support team at 817-795-5555 ext. 801. ©





# Utilizing the Features & Benefits of POS Manager for POS Ease

By: Chris Boebel, CIO,  
Delta Sonic Car Wash

Mike Jones, Field Support  
Manager, Delta Sonic Car Wash

Melissa Fox Hadley, Director  
of Product Management,  
The Pinnacle Corporation

Over the past few decades Point-of-Sale (POS) systems have continued to evolve to meet the demands of consumers and retailers. Certainly this is true when it comes to things like PCI and the complexity of providing a secure transaction, but as we learn more about our customers we also want to tailor our systems to enhance their shopping experience to gain a competitive advantage. The result is that we make changes to our POS system more frequently, and treat stores differently thereby increasing the complexity of managing POS systems.





“Profiles are very nice. We have profiles set up to use when we have broken hardware. All that we need to do is replace the hardware and generate the profile to the register for the new hardware in place.”

For example: A “simple” request from the marketing department to add a new button for a promotional item at all 150 stores probably makes you want to pull your hair out. Simple? Yeah, right! Adding one small button to 150 store POS systems, where no two have the same exact board layout, not to mention the registers in the same store are not identical; may not seem all that simple if you’re the person having to manually touch each POS to add it.

And what about the fuel department’s need to communicate fuel price changes to the store? Like many companies, you may have several people involved in that process and as we all know the more people involved the more possible points of failure. With volatile fuel pricing these days, getting price changes to the store and applied quickly can mean a big impact to profits.

For the IT or help desk staff, needing to make configuration changes like updates to device settings or receipt layouts on the POS might seem like a nightmare. Time consuming, multiple files and settings, inconsistent registers and register setups across the store install base, are all factors that can contribute to this perception.

These are exactly the kinds of challenges facing one of our long-time Palm POS clients, Delta Sonic.

### BUSINESS PROBLEM #1

While Delta Sonic chose Pinnacle’s Palm POS because of its flexibility and control to tailor their POS system to best fit each store, configuring any POS can be time consuming and with all of the different tables and

configurations; mistakes can be made especially if the person configuring the register is not familiar with the POS structure.

*Although they had been using Palm POS for years without POS Manager and could handle configuration and maintenance of the POS manually, Delta Sonic knew they could realize some very real benefits by using POS Manager.*

### Secure Access to Maintenance and Setup

– The POS Manager solution is built on the Pinnacle Business Platform and takes advantage of all the security settings within the Platform’s system configuration. Create security access for those team members who you want to use the system, from creating and maintaining boards, to reviewing INI settings to determine what configuration is in place.

**Web-based access** – Because the POS Manager solution is a browser-based application, it can be accessed from anywhere on your network and requires only a Web-browser to access.

### Make Changes in Advance

– Changes to configuration areas, whether those are Boards or other areas of the system, can be made in advance by setting the Effective Date of the configuration.

**Preview** – Rather than having to send over changes to Palm to see how they’re going to look, the user can access the Preview areas to see exactly what will be visible on the Palm system.

**Table names and settings** – Without POS Manager, the Palm IT staff must use the Palm Technical Manual to familiarize themselves with which table names and INI settings contain the data they want to edit and to find out the possible values for those settings. The Technical Manual has been implemented within the user interface of POS Manager so that the IT staff does not need to know individual table names or INI settings and values.

*“Profiles are very nice. We have profiles set up to use when we have broken hardware. All that we need to do is replace the hardware and generate the profile to the register for the new hardware in place.”*

—Mike Jones, Field Support Manager, Delta Sonic

### BUSINESS PROBLEM #2

Making board changes was difficult and time consuming, requiring a large amount of manual processes. So rather than having to make those changes, about 95 boards were created and existed at all registers in all store locations, whether the boards were needed or not. With this many boards residing on the registers, starting up and processing normal POS transactions became very time consuming and was a burden on the system, not to mention the support staff.

**Remember, these are simple changes, right?**

This is a typical misconception about Boards. The majority of Board changes that are requested by the Marketing group within a retailer’s organization are not actually

implemented. This is because most IT staffs are already dealing with numerous projects that are time consuming and critical and these Board changes are often considered unnecessary by the IT group. Add to that the fact that these IT staffs have to manually edit 5+ different Palm POS tables, they have to know how those tables are related to each other and what changes need to be made in each, and they have to know which registers and stores receive which Boards. For companies with 100+ stores, this is typically hundreds of possible configurations.

With POS Manager, Boards are configured by creating Board Sets and Groups that relate like-Boards then link to like-Stores and like-Registers. This means that a change needs to only be made to those groups, not to every single register.

In addition, when using POS Manager, there is no need for the IT group to handle Board changes any longer. Since POS Manager is a web-based application residing on the Pinnacle Business platform, the marketing group can become the owner of the Boards and how they want them to be configured. They don't need to know anything about Palm POS itself, since all of the setup is done through the graphical user interface.

*"Consistency is the key factor of POS Manager. You know what you are sending to your registers at all times; there is no guessing."*  
Mike Jones, Field Support Manager, Delta Sonic

### BUSINESS PROBLEM #3

Many of the stores within the chain have different hardware and peripheral platforms. To keep track of all of the different configurations manually, without POS Manager, is very difficult and time consuming to manage and maintain.

***POS Manager reduces the amount of time to configure each individual register and to remove the complexities associated with***

***having to maintain those register configurations.***

**Grouped Changes** – Remove the need to keep track of individual store configurations by grouping stores and registers by their common traits or by their unique traits. For example, the register at the store that manages outside dispenser transactions might have an additional POS Board that other registers don't have; or some registers might be running on one hardware platform brand that is different than another, requiring specific configuration settings. These commonalities and uniqueness's are all defined within POS Manager at the time the stores and registers are configured.

“Consistency is the key factor of POS Manager. You know what you are sending to your registers at all times; there is no guessing.

– Mike Jones, Field Support Manager, Delta Sonic”

**Distribution** – Using the existing communication methods in place with Pinnacle software, easily distribute configurations to the POS where all the effected registers will get updated.

### THE RESULTS

- Time reduction in setting up POS systems
- Consistency across registers
- Flexibility in determining which registers and stores get which boards and configurations
- Boards and buttons are extremely easy to setup resulting in a huge time reduction.
- Reduction in boards existing at each register. Registers now only have the boards that are required.
- Minimizes risk of configuration errors.
- Profiles eliminate the need to create configurations for each

store and all store registers. They allow for much more flexible configurations.

- As a result of setting up configurations in POS Manager, the POS system configurations including boards were cleaned up giving each system a fresh set of configurations.

*"For us the cost of POS Manager was minimal and the benefit that we got in the long run really beat out the upfront labor of setting up configurations in POS Manager."*  
—Chris Boebel, Director of IT, Delta Sonic

If you're not using POS Manager to configure your Palm POS system today, you may be experiencing some or all of these challenges. POS Manager provides an intuitive user interface that allows the IT group, the marketing group, and the fuel department one single tool to make these types of changes at the POS, all from a central server and database. Contact Pinnacle today to learn more, [contactus@pinncorp.com](mailto:contactus@pinncorp.com) or 817-795-5555 ext. 287.

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Delta Sonic (<http://www.deltasoniccarwash.com>) is headquartered in Buffalo, New York, and operates a chain of 28 car wash locations; 27 of which are also convenience stores. A Pinnacle client since 2001, Delta Sonic utilizes an enterprise-wide suite of Pinnacle applications including Palm POS, Palm.kiosk, Manager Workstation, Auditor, POS Manager, Price Book and Fuel Smart. ©

# Pinnacle Training: Flexibility to Meet Your Needs



By: Jim Walther, Training & Documentation Manager, The Pinnacle Corporation

**A**re you relatively new to Pinnacle products, having just implemented? Or are you a long-time user? Either way, you may feel you need a refresher course but are reluctant to take one. Pinnacle's new training strategies are hoping to change that. We now offer three types of training: Arlington-based, on-line, and on-site. Any of these offerings can help you become more proficient with our products, making you more efficient and effective.

We have learned that our Arlington-based classes are typically the best option. Not only are they free of charge, but you get a chance to meet Client Support personnel and other Pinnacle employees, thereby putting a face to the name of the people you have gotten to know over the phone. Because the classes are open, you may be in the room with other Pinnacle clients, which can lead to business relationships that are mutually beneficial. Finally, you will be out of the office and away from your desk, which enables you to focus on gaining knowledge of Pinnacle products rather than answering emails or sitting in meetings.

Another option we provide is on-line training. These classes are available at a

fee, but are scheduled when convenient for you. You can gather in a conference room with as many people as you like to view the training. We can also record the session for you to review as often as you like. The benefit of this type of training is the flexibility of times and the length of training time is only half a day, rather than a full day or multiple days. The primary downsides are not being able to interact face-to-face with the instructors and staff, and not being able to meet and network with other Pinnacle clients.

Finally, we offer on-site training. These classes are also available for a fee, but are customizable based on your needs. Generally taught by our Professional Services personnel, these classes allow you

to determine what areas you need to focus on as well as allowing you to stay at your office while receiving the training. All you will need is a conference or training room and individual stations set up with the software. As with the on-line training, you will only meet your trainer and will not have the opportunity to network, but the flexibility of have the training detailed to your needs may outweigh the drawbacks.

So if you are feeling like you need a refresher course on some product or products, contact Pinnacle and we will help you determine your best solution. We are flexible enough to meet your ever-changing needs, so contact us at 817-795-5555 or [jwalther@pinnacorp.com](mailto:jwalther@pinnacorp.com). ©





# ASK THE EXPERT

Log Review & Where to Start Troubleshooting

By: Daniel Ledbetter, Client Support Senior Analyst I, The Pinnacle Corporation

One of the best ways to help increase uptime and lower the need for support calls is to learn how to navigate the log files and what data the individual logs contain. Once you understand how the logs are laid out you are able to locate the data you need to review quickly and accurately.

Most logs can be read using a simple text editor such as windows notepad or WordPad. A more in-depth editor will give you additional resources, such as searching for all instances of a piece of data in the file or from multiple files at once. I currently use a tool named PSPad which will allow you to search or edit everything from xml files to log files.

In order to troubleshoot efficiently you have to understand where to begin the search for the problem. Sometimes this will be a single log but some issues may require review of several different logs to identify the problem. If you have an error message try searching for key words. You can also search for transactional data or when none of the above is available, you can also search based on when the problem occurred. Below you will find some starting points for different types of issues.

When issues occur with your Palm Hardware, such as peripherals not functioning, hardware error messages, etc. you will want to start your troubleshooting with the .log, .drw, .prn or .mrd files. You may also want to review your ini files for errors, incorrect opus names or incorrect port numbers among other things.

For issues with credit, such as batching problems, credit down, errors processing certain card types, strange denial messages, etc., you will want to start your troubleshooting in the .log, .crd, .cdt, or .dpt log in Palm and also the .log file located in the Pharoh\YourNIMsName folder.

For issues in Palm Software, such as blank or black fuel displays, stuck transactions, errors when loading Palm, buttons that don't work properly, you would start your search using the .log, the .r232protocol log, or the gas.controller log. You may also need to review the ini files for incorrect settings.

For Journal Manager issues such as data not flowing, problems with day close, missing data or shifts, or unable to start journal or shift manager, you would begin your search in the log file located in the oaswin-JM\_logs folder. You may also need to research in the j\_error file located in the oaswin folder or the .jcclient log in Palm.

If you find that the log files are not giving you enough information I recommend you set them to the highest possible level. Below is a description of what different log files contain and their level settings. This information can also be found in the User Manuals

### **Palm General Log(YYYYMMDD.Log)**

The general log captures generic information such as card discrimination, item ringing, startup and shutdown, special window accessing and error messages displayed to cashier. Log levels are 1-4 and 6. Log levels are set in the POS.INI [SYSTEM] section, LogLevel setting.

### **Palm Card Discrimination Log (YYYYMMDD.CRD)**

The card discrimination log holds all information about Palm's discrimination sequence. This log can be used to troubleshoot issues when card swipes are not recognized. This log can be turned on in the [Credit] section of CREDIT.INI. CardLogLevel=0 or 6.

### **Palm Inside Credit Log (YYYYMMDD.CDT)**

The credit log captures all inside credit data except card discrimination. The credit log shows information about credit transactions request/response data from the host, and approval/denial information. To setup the credit log go to the CREDIT.INI [Credit] section and set LogInfo=Yes or No.

### **Palm DPT Credit Log (YYYYMMDD.DPT)**

The DPT log contains messages that are specific to the DPT server machine. Log levels are 1-4, to set the log level go to the LogLevel setting in the [DPT] section of GAS.INI.

### **R232 Protocol Log (YYYYMMDD.gas.R232Protocol)**

The R232Protocol log captures data sent from the Allied/Nexgen box to the dispensers and Point of Sale.

### **Palm Printer Log (YYYYMMDD.PRN)**

The printer log captures the start and end time/date of every ticket printed. The printer log levels are 0-6 and are set in the [ReceiptPrinter] section of POS.INI.

### **Palm Cash Drawer Log (YYYYMMDD.DRW)**

The cash drawer log captures all drawer open/close data, drawer status information, and drawer open events. The valid settings for log level is 0-2: 0-None, 1-log only errors, 2-log all transmitting data and are set in the POS.INI [CashDrawer] section.

### **Palm JC Client Log (YYYYMMDD.Jcclient)**

The JC client log file is created by JCClient.dll file and captures the version number of the .exe and communication errors. JC client log levels are 0-1 and are set in the POS.INI file [JC Client] section.

### **Palm Money Order Log (YYYYMMDD.MRD)**

The money order log captures the messages from Palm to the Money Order machine. Money Order log levels are 0-6 and are set in the POS.INI file [Money Order] section using loglevel=

Most other Pinnacle software such as credit servers and journal manager do not have individual settings but are always capturing the highest level of data or as in the case of Journal Manager, will automatically switch to the highest level if there are issues

When you are checking setup files such as the POS\*. \* files or the INI files within Palm and Pharoh your best resource for what settings are available and/or necessary for your particular setup are the User Manuals located on Pinnacorp.com. The User Manuals will always have the most up to date information for current released versions of Pinnacle software.

For any additional questions, be sure to participate in my breakout session on logs at the upcoming Pinnacle Summit or contact me directly, dledbetter@pinnacorp.com. ©





# Taking Your Loyalty to the next Level with **Alternate ID Sign-up**



**By: Jane Sinn Gabriel, Retail Solutions Manager, The Pinnacle Corporation**

**A** successful loyalty program depends on consumer participation, and ease of membership is the key to achieving high rates of participation.

Consumers are savvy and experienced in how loyalty programs work; they know that they should be able to provide a phone number to participate in a retailer's loyalty program. Requiring the consumer to present a card each time they make a purchase is an inconvenience, the very thing that a convenience store does not want to impose on their customers.



## Support for the Alternate ID

With the release of Loyalink 3.2 and Palm 12.2, Pinnacle Loyalty Solutions deliver support for the creation and use of an alternate loyalty membership ID.

## Easy for the Store Associate and the Loyalty Member

Our design offers a customer the opportunity to assign an Alternate ID during checkout or via the retailer's loyalty web page and, from that point forward, to use that Alternate ID for any future transactions.

## Assigning an Alternate ID and PIN

### At the Store

The **Sign-up Service** is a Pinnacle solution developed to support the in-store registration of loyalty members. It provides an easy to use method for gathering member information.

With this update, along with capturing the member's name and address, the Sign-up Service application includes the option to assign Alternate ID number. The Sign-up Service allows for the scanning of a driver's license and the manual entry of additional information, like the member's email address, cell and home phone numbers, as well as their Alternate ID. The Alternate ID will default to a cell number first and the home phone second, or the member can choose to assign any unique, easy-to-remember, 10-digit number. No other member can have the same Alt-ID.

A **secure PIN assignment** is also supported and can be established via the PIN pad during the first Points Redemption transaction.

### Transaction Processing

The Alternate ID works at the POS and at the Pump in much the same way an actual card works today. A loyalty member can opt to have the store associate enter the ID or the member can enter the Alternate ID on the PIN pad. Once the ID is entered the purchase will be sent to the Loyalink host where it will be processed. Nothing about how Loyalink processes a purchase will change. The visit will be counted, the dollars spent recorded, club card counts will be incremented, and points will accumulate.

Instant Rewards and Fuel Price per Gallon Discounts will be delivered to the POS or to the Pump in the same way they would be if a card was used rather than the Alternate ID.

At the POS, the process has been streamlined to make redemption simpler than it's been before while keeping it more secure. Regardless of whether an ID is swiped or scanned from a barcode or if an Alternate ID number is used, when a loyalty member chooses to Redeem Points, the ID that was submitted initially is carried over for Redemption processing and the member does not have to offer that information again. The consumer is simply asked to enter the PIN into the PIN Pad to complete the redemption.

### At the Office

An Alternate ID can be established at the home office, which allows a loyalty administrator to assign an Alternate ID, along with other consumer information. Once established, an

Sign-up Service application



Entering the alternate ID at the register



Entering the alternate ID at the pump

Alternate ID can also be used to look-up an account via the Search tool.

A **Loyalty program administrator** can also assist a loyalty member with the assignment of a new PIN.

This option works much like a standard resetting of a password, where the administrator de-authorizes or clears out the existing PIN and the member is then allowed to enter a new PIN. This follows existing privacy standards while providing a retailer with the means to assist a member in securing personal information.

Another new option for loyalty administrators is the option to merge two accounts into a single account. This will be particularly helpful as retailers offer support for their members to use an Alternate ID. Now members will be able to remember their ID, rather than having to establish a new account each time they appear at the store without their card in hand.

## At Home

The **Loyalty Web Template** also provides loyalty members with the option to assign or edit an Alternate ID and PIN via a web site.

## Maximizing the benefits

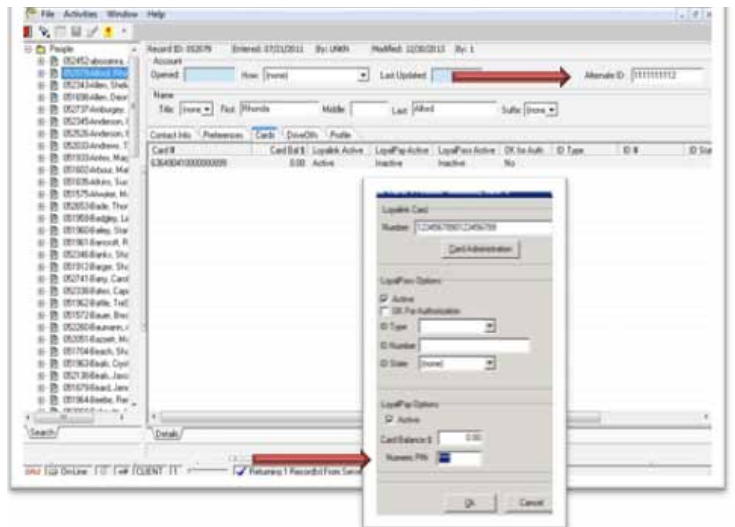
For greater member adoption and convenience, we recommend the implementation of Sign-up Service at the store and an update to the Loyalty Web Template.

- The Loyalty Web Template is included in the standard Loyalink deliverable. However, some of our Loyalink clients use a webpage of their own design. If a Loyalink client is interested in employing an option to assign the Alternate ID through their own webpage, we can provide the information they will need.
- Sign-up Service is a licensed application

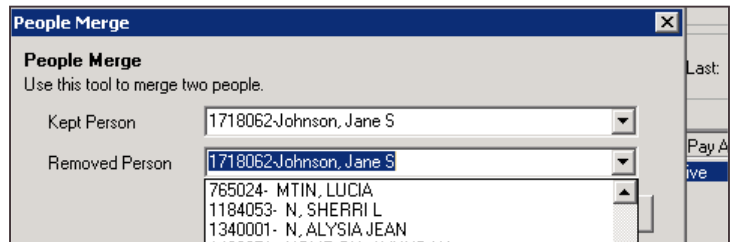
For more information about Pinnacle's Loyalty Solutions and the new Alternate ID feature, contact your Pinnacle Account Representative at <http://pinncorp.com/client services.aspx> or 817-795-5555 ext. 802. ©



Points redemption at the register



Establishing an Alternate ID at the home office



Merging two accounts into a single account



Establishing an Alternate ID with the Loyalty Web Template



## Pinnacle Employee Spotlight

# Yiraine Colon

Staff Accountant

Pinnacle's Chief Financial Officer Jerry Sobocinski, commented, "She has consistently raised her level of performance over the past quarters including juggling the many tasks with changing schedules and due dates for various departments. Her work on providing clients an analysis of their charges on new install projects in an accurate, clean and easy to understand format assists TPC with receiving payment on the finished project. She trains and assists the other department personnel in the processes from contracts to maintenance to billing and payables. She is truly a team player."

### When did you join TPC?

January 2012

### Products You Work With

Being in the admin department limits my exposure to our products, however, after working so closely with some of our clients, I have begun to keenly understand the connection between all our different products.

### About Yiraine:

I'm the youngest of four children and was raised in the Bronx, New York. I graduated in 2011 from Johnson & Wales University in Providence, Rhode Island, where I studied Accounting and Finance. I recently got engaged to my high school best friend and shortly thereafter made him move from New York to Texas.



### What do you like to do when you're not at Pinnacle?

Although my fiancé believes that I only like to read and be a homebody, I keenly disagree. I love to travel, cook, and spend time with my niece and nephews. I'm a huge baseball fan and enjoy attending a game, no matter how hot it is in Texas. ©

### Favorite Aspect of Your Job

**“** Having the ability to assist clients with reconciliations of their account. I enjoy analyzing a client's account and being able to assist a client through their concerns. Being able to hear the relief in a client's voice once they can fully understand their account, makes all the hours of hard work worth it. It's very rare to come across such a great bunch of clients, but I truly enjoy working with them. **”**





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