



DMS Setup Assessment - Customer Form Part 1

Please complete Part 1 and e-mail or fax (847.295.8252) to a Liquid Controls Service Professional.

CONTACT INFORMATION

Company: _____

Street Address: _____

City: _____

State: _____

Zip Code: _____

Phone Number: _____

Website: _____

Primary Contact for installation and set-up of the DMS i1000: _____

Primary Contact Phone Number: _____

Primary Contact E-mail Address: _____

BACK OFFICE/FUEL MANAGEMENT SOFTWARE PROVIDER INFORMATION

Name of back office/fuel management software provider: _____

Contact at back office/fuel management software provider: _____

Contact's Phone Number: _____

Contact's E-mail Address: _____

PLEASE ANSWER THE FOLLOWING:

Are you currently using an LC3 system? _____

If yes, what software version are you using? _____

Is this a retrofit of DMS to an existing fleet or is it a new truck installation? _____

Do your trucks already have LCR-II's installed? _____

If yes, please provide the product calibration numbers and product name. *They are listed on a LCR-II Calibration ticket.*

How many drivers do you have? _____

How many trucks will be equipped with DMS? _____

Are any of the trucks 2 or 3 meter systems? _____

How many sites will be running DMS Office? _____

How many computers will be running DMS Office? _____

Will you be using preprinted tickets? _____

Will you be using a roll printer or slip printer? _____

Do you make residential and deliveries? _____

Do you want drivers to Login? _____

If yes, do you want to require a password to login? _____

What country are you in? _____



DMS Setup Assessment - Customer Form Part 2

Please complete this portion with a LC Service Professional. E-mail or fax (847.295.8252) completed form to a LC Service Professional.

PLEASE SUPPLY SAMPLES OF THE FOLLOWING:

- Current delivery ticket
- A markup of how you would like your tickets to print
- A sample of data exported from your back-office or accounting software. Please include all the data you would like to have in the DMS i1000 including customer name, address, directions, price, taxes, etc.
- Many back-office/fuel management software companies have an existing interface to Liquid Control products. If so, please provide an sample of the export file.

PLEASE SUPPLY THE FOLLOWING OR FILL IN THE ATTACHED DATA SHEETS:

- A list of drivers and passwords
- List of products
- List of Miscellaneous Charges
- List of volume discounts, the respective discount amounts (percentage or per-unit) and the breakpoints (days or volume).
- List of early payment/cash discounts, the respective discount amounts (percentage or per-unit) and the breakpoints (days or volume).
- List of taxes, tax rate (percent or per-unit). Highlight any that are a tax-on-tax.

PLEASE ANSWER THE FOLLOWING:

Do you use Miscellaneous Charges? _____

If yes, do miscellaneous charges use the same tax codes as the product delivered? _____

Do you want Miscellaneous Charges applied automatically or by the driver? _____

Do you have regulatory compliance fee? _____

Do you use pre-buy pricing? _____

Do drivers collect payment at delivery sites? _____

Do you use different headers & footers for different customers? _____

Do you use different ticket headers for different locations/offices? _____

Do you use different ticket footers for different locations/offices? _____

Will you run the application from a server? (run multiple locations from a single server) _____

Do you allow multiple deliveries at one site? For example, do customers have more than one tank? _____

Do you want to import beginning balances from your back-office system? This will automatically print on the ticket. _____

Are cash discount applied before or after taxes are calculated? _____

Are volume discounts applied before or after taxes? _____

Are cash discounts applied by driver or automatically? _____

The normal search function allows searches by access number or name. Do you want to be able to search by city? _____

Do you want to give drivers access to price & tax changes? **No price & tax changes (None), Scheduled deliveries only, Miscellaneous Charges only, or All transactions.** _____

Do you allow drivers to be able to change pricing and taxes? *Most regulatory authorities do not allow price changes after a delivery* _____

Do you want to print cumulative totalizers by LCR Calibration on the Shift Ticket? _____

For simultaneous deliveries, do you want to combine taxes or treat taxes separately? _____

If in Canada, do you charge a Carbon Tax? _____

Itemize taxes? **Required or Optional but preferred** _____

File Location for dispatch file (LCLoad): _____

File location for delivery file (LCRead): _____