



# Retail

ENTERPRISE SOFTWARE FOR  
PETROLEUM RETAIL AND CONVENIENCE STORES



# Thank You for Your Interest

## IRELY'S SOLUTION FOR CONVENIENCE STORES.

**Act Instantly on Key  
Performance Indicators**

**Streamline Daily Operations**

**Centralize Your Pricebook**

**Manage and Optimize  
Inventory**

**Consolidate Your  
Financial Data**

Thank you for your interest in iRely's C-Store Solution—the most complete, flexible, and feature-rich software product on the market.

For over 35 years, iRely has been leading the industry by providing a comprehensive solution for petroleum wholesale and retail operations. How do we do this? Well, our motto is simple. We simplify complex business processes, and we win when you win. We have implemented a customer-centric model where your needs come first. Your growth, your profitability, and your return on investment matters to us. Beyond our own expertise, our product is infused with the expertise and industry foresight gleaned from over 35 years of helping customers solve their organizational pain points.

As the industry continues to evolve and require additional automation, iRely will remain committed to evolving with you and staying ahead of your needs. In fact, we've deployed a state-of-the-art web technology that will serve our customers for another 35 years. As further proof of our commitment, we have developed a User Group Program. This program offers customers updates, upgrades, phone support, online support manuals, online customer panel, discounted training, and an annual educational event. This program has had great success among our customers evidenced by an over 95 percent enrollment rate.

We believe we can help drive profitability, improve efficiencies, simplify business processes and eliminate errors and waste in your organization. We invite you to take a look, explore a little further, and then give us a call. Your business is unique to your organization. Before any solution can be proposed, we need to understand you, your organization, and your vision for the future. Give us a call at 800.433.5724, so we can help give you a clearer picture of how an enterprise software solution can benefit your organization.

Sincerely,  
iRely Team



# What You Can Expect with iRely



<b>iRely Dashboard</b> <span style="float: right;">4</span>	<b>Daily Operations</b> <span style="float: right;">6</span>	<b>Inventory Control</b> <span style="float: right;">8</span>
<ul style="list-style-type: none"> <li>• See your entire day in a glance.</li> <li>• Be notified when issues need your attention.</li> <li>• Manage by exception.</li> <li>• Centralize and organize your entire organizational data.</li> <li>• See your business data the way you want to see it.</li> <li>• Quickly and easily create custom reports.</li> <li>• Integrate all operational systems.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduce technology costs by running a single integrated system.</li> <li>• Reduce labor costs by eliminating double entry.</li> <li>• Reduce labor costs by passing information electronically to the home office.</li> <li>• Reconcile cash coupons and deposits, and audit gross profit.</li> <li>• Reduce shrinkage with system controls.</li> <li>• Go green by reducing printed reports and documents.</li> </ul>	<ul style="list-style-type: none"> <li>• Track key merchandise to prevent shrinkage without having to tightly manage all items.</li> <li>• Count more quickly and more frequently to eliminate shrinkage and human errors.</li> <li>• Eliminate cost by interfacing to POS and vendor systems.</li> <li>• Eliminate vendor shrinkage.</li> </ul>
<b>Centralized Pricebook</b> <span style="float: right;">11</span>	<b>iRely Difference</b> <span style="float: right;">14</span>	<b>One Solution</b> <span style="float: right;">17</span>
<ul style="list-style-type: none"> <li>• Manage pricing at all your stores centrally.</li> <li>• Automate pricing to ensure you make the optimal margins.</li> <li>• Setup and manage promotional prices centrally.</li> <li>• Prevent fines by ensuring your POS system is loaded with the proper restricted item information.</li> <li>• Put yourself in control of your margins, not your vendor.</li> </ul>	<ul style="list-style-type: none"> <li>• Take advantage of the latest advancements in technology.</li> <li>• Enjoy the benefits of three-tier technology.</li> <li>• Partner with a company that proactively pursues quality.</li> <li>• Deploy software the way that best fits your organization.</li> <li>• Implement successfully with our Business Process Review methodology.</li> <li>• Protect your investment with iRely's on-going support and upgrade program.</li> </ul>	<ul style="list-style-type: none"> <li>• Consolidate and leverage all your wholesale and retail data.</li> <li>• Get all the financial reports you need without jumping through hoops.</li> <li>• Track both dollars and units in GL.</li> <li>• Ensure control over AP and cash.</li> <li>• Save time and money with Positive Pay and ACH.</li> <li>• Unleash the power of your employees and drivers and eliminate their busy work.</li> </ul>





**In today's fast-paced environment, your success is dependent on your ability to quickly see, analyze, and respond to the issues your business faces day-to-day. iRely Dashboard allows you to do exactly that, putting all your business information at your fingertips. While iRely tracks your business end-to-end, Dashboard brings it all together. See more. Do more. Achieve more.**



## See Your Day in a Glance

Do you spend hours flipping in and out of screens? Do you constantly run a multitude of reports to analyze daily performance? iRely lets you see all this information up front, on one screen! Everything you need to make decisions, root out issues, and monitor performance is available in one place, in real-time.

## Be Notified when Issues Need Your Attention

Don't let issues get out of hand. Be notified immediately when your numbers go above or below acceptable levels. iRely Dashboard allows you to set up conditional formatting and email alerts. That way you can immediately see where action is needed. Manage by exception. Rest easy knowing you'll know when problems occur.

## Focus Your Time on Your Most Pressing Issues

Not only does iRely alert you to issues, it alerts you to all issues. This means you can better prioritize what you want to tackle and when. Don't get distracted by minor problems and miss a major issue hiding under the covers. iRely's Dashboard effectively allows you to make the best use of your time.

## Centralize Your Business Data

Do you oversee multiple departments or areas of business? Do you struggle deciding which areas need your focus, or where you might not be getting the 'big picture'? iRely Dashboard allows managers to quickly gauge the health of each department as well as the entire organization. Data can be viewed on one screen or organized among tabs. iRely Dashboard can also be deployed through the web or mobile device. This means you can stay on top of your job even when you're away from the office! See everything you want to see, when and where you want to see it.

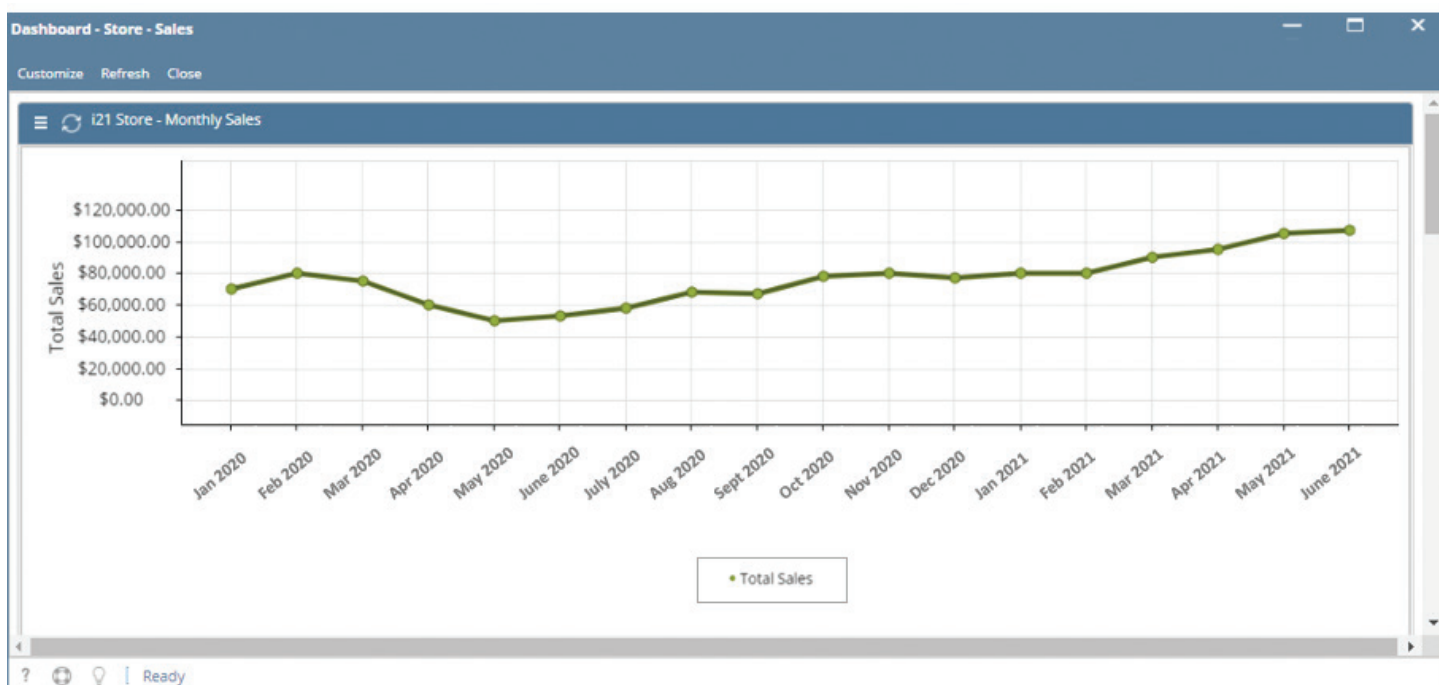
## Connect to Other Programs

Do you use other software solutions to run your business? iRely allows you to bring in and analyze information from other programs, all on a single screen. If your software program stores information in an industry standard database such as MySQL, MSSQL, Oracle, XML, ODBC-compliant, DB2, MS Access, and more, iRely Dashboard tools will apply to that program as well.



## Make Reports the Way You Want

Don't like the standard iRely reports? Want to change the fields, fonts, or design? Don't have a degree in computer science? That's fine! iRely Dashboard was built with you in mind. By employing a WYSIWYG (What you see is what you get) editor, creating custom reports has never been easier! Simply drag and drop fields into a page, change font sizes and colors, and apply any desired filters. The result? You can view reports and filter data on the fly! Want to save a report to PDF? Need to further analyze a report in Excel? Want to quickly email a report to a customer or manager? iRely Dashboard offers all these options and more with a click of a button!



Sample Monthly Sales Chart

## See Your Business the Way You Want to See it

Your profitability and competitive advantage rests on your people's ability to see and analyze your data. The analytics that drive your success may or may not be the same as others in the industry. While iRely Dashboard comes with 100+ pre-defined metrics, it doesn't stop there. iRely puts the user in control of what they want to see and how they want to see it. iRely's simple query builder and navigation allows the average computer user to create additional charts and graphs. Give your employees the tools they need to work smarter.

**At the end of the day, are you sure you have accounted for every dollar and every item in every store? With iRely, you can be certain every penny is present and accounted for. Our built-in tools and reports are designed to streamline processes at both the store and home office levels while optimizing communication between the two levels. As you add more stores, these benefits are multiplied across your organization.**



## Cash Control

iRely gives you the tools you need to deter theft, find mistakes, and distinguish between the two. By implementing scanning at the register and counting procedures, you are ensuring pricing accuracy and identifying any errors. After scanning, iRely allows you to take theft deterrence a step further by reviewing and identifying fraudulent Error Corrects, Voids, Refunds, and other POS loopholes through cashier tracking. Implementing scanning at inventory receipt will offer additional benefits. First, it eliminates vendor theft. Second, it guards against unauthorized cost changes by paying based on contract price. Third, it protects against inconsistencies between invoiced and received quantities. And finally, it improves accuracy and saves labor by causing data to flow directly to the home office, rather than requiring double entry. Additional labor savings are gathered from improved end-of-day procedures that reconcile your cash with external transactions, such as credit cards, coupons, and store deposits. This information then flows from store to home office, saving time and eliminating double-entry errors. iRely allows you to make sure only those who should have access to certain menus and reports have access.

Similarly, our cash control features extend to our lottery management tool. As you control your cash, you will also be able to count lottery tickets to prevent theft. You can track games by book, inventory by book, and identify any missing unsold lottery tickets as you conduct your daily sales reconciliation.

Throughout the iRely solution, security is a priority. Controlling your cash as it moves from hand-to-hand throughout the day across multiple stores seems like a difficult task. iRely gives you the tools to do so, simply.

## Home Office Integration

While iRely streamlines your processes throughout, the benefits are most measurable at the home office. Tasks that required physical records at the store level to be reentered at the home office are now electronically captured and sent to the home office. Enter invoices, employee work hours, and inventory counts to have that information flow through to payables, payroll, and general ledger. You can attach supporting paperwork, allowing the data to reach the home office

immediately. This saves on travel time to and from stores and eliminates errors and paper waste. In addition to information flowing from stores to the home office, the home office can push information out to the stores electronically. Price changes flow from the home office to the store. Finally, iRely's tools automate functions, eliminate duplication of effort, and improve accuracy to the degree that you can begin to manage by exception. No longer do you need to dig through mounds of paperwork to safeguard your margins. iRely does the work for you so you can target and focus your attention on problem areas. Are you overstaffed at some stores and understaffed at others? Make objective decisions based on real numbers with iRely's Sales vs. Labor report. This and other reports will ensure you can manage all your stores efficiently and effectively from one location. iRely's comprehensive approach extends its reach to every aspect of our solution, including technology. Routine tasks, like backups, do not need to be carried out at each individual store, but can occur with the home office's nightly backups. Additionally, included in iRely's User Group Program are off-site backups lessening your risk of disaster. With iRely, you'll never miss a step.

## Rebates

Today's vendors are offering additional rebates for providing scanned data. In some cases this can average \$1-3K per store. iRely software enables you to capture all the scanned transaction data from the register and, with our various certifications, automatically create the file and FTP it for submission to ensure your store is meeting vendor submission terms.

Register Dept No.	Department	Dept. Description	Item No.	Item Description	Transaction Count	Items Sold	Year Sales Amount	Register Sales Amount
1029	FF Clear Grease	FF Clear Grease	VLSD Clear Gre...	Ultra Low Sulfu...	0.00	0.00	0.00	0.00
2	3-Grocery Tax	3-Grocery Tax	DEPT-2	DEPT-2 MISC G...	18.00	18.00	88.61	88.61
3	3-Grocery Non Tax	3-Grocery Non Tax	DEPT-3	DEPT-3 MISC G...	10.00	12.00	13.92	13.92
4	4-Auto	4-Auto	DEPT-4	DEPT-4 MISC A...	2.00	2.00	8.18	8.18
5	3-Dairy	3-Dairy	DEPT-5	DEPT-5 MISC G...	12.00	18.00	37.08	37.08
7	7-Food/Energy	7-Food/Energy	DEPT-7	DEPT-7 MISC R...	114.00	180.00	218.77	218.77
8	9-Dei	9-Dei	DEPT-8	DEPT-8 MISC D...	3.00	3.00	8.87	8.87
9	9-Dei	9-Dei	DEPT-9	DEPT-9 MISC H...	4.00	4.00	8.79	8.79
10	10-Lottery Interm.	10-Lottery Interm	DEPT-10	DEPT-10 MISC	117.00	288.00	0.00	1,821.00
11	11-Snacks	11-Snacks	DEPT-11	DEPT-11 MISC	48.00	87.00	158.87	158.87
12	12-Candy	12-Candy	DEPT-12	DEPT-12 MISC	38.00	81.87	81.87	81.87
13	13-Snack/Wine	13-Snack/Wine	DEPT-13	DEPT-13 MISC	44.00	89.03	350.23	350.23
14	14-Lotto Interm. Payout	14-Lotto Interm. Payout	DEPT-14	DEPT-14 MISC	0.00	0.00	0.00	0.00
15	15-Propane	15-Propane	DEPT-15	DEPT-15 MISC	1.00	1.00	19.89	19.89
Audit Log					941	1387	6,594.88	8,187.88

Sample Transaction Details

## How Much Labor Cost Can I Save with iRely?

### Assumptions:

Average Annual Salary + Benefits: \$50,000  
15 Store Chain

### Auditors

Manage by Exception	25%	\$ 12,500
Eliminate Duplicate Entries and Errors of Store Paperwork	50%	\$25,000
		<b>\$37,500</b>

### Supervisor

Reduce Physical Travel Time between Home, Office and Store	7%	\$ 3,500
		<b>\$ 3,500</b>

### Payroll Clerk

Employee Electronic Time Entry at Store Eliminates Duplicate Entry at Home Office	10%	\$ 5,000
		<b>\$ 5,000</b>

### Pricebook Manager

Price Definitions -Automate Gross Margins at Entry Level between Entire Chain and Individual UPC	15%	\$ 7,500
Pricebook Planning Guide - Home Office to Store Price Automation	15%	\$ 7,500
		<b>\$ 15,000</b>

**Total Annual Labor Savings: \$ 61,000**



**Do you know which store items are making you money and which are simply collecting dust? With iRely, you can optimize your inventory and merchandise to ensure you are making the most of your floor space. iRely provides a unique set of reports and checks and balances giving you power to make more money. If that weren't enough, iRely allows you to do that with less: less labor, less errors, and less headaches.**



## Inventory Tracking

The first step in optimizing your inventory is streamlining your day-to-day functions. Move away from managing routine activities and instead pinpoint areas that need improvement. Automate inventory receipt, counts, and reordering. With iRely, you can save money and focus on making more.

iRely allows you to manage inventory by item level, retail/cost by department, or both at the same time! This allows you to closely monitor key merchandise and manage the rest by exception. Receive electronic invoices from vendors by item, by retail/cost by department, or both. Check invoices against actual items received and request credit memos from vendors for discrepancies. Save time and money across stores as this data moves electronically to the home office.

Additionally, iRely completes the inventory management cycle by managing reorders. iRely allows you to set up minimum order points virtually eliminating stock outs, ensuring you don't miss out on valuable sales opportunities. When inventory levels fall below threshold values, iRely generates a report letting you know what needs to be reordered by store and by vendor, thereby making reordering a breeze.

Finally, through iRely's food service capabilities, you will be able to carefully track inventory by ingredients, costs by ingredients, and conduct recipe management. This allows you to track inventory and margins accurately on your prepared foods based on the ingredients used.

## Inventory Optimization

After streamlining your daily store inventory processes, you're ready to begin optimizing your inventory and increasing your gross margins. iRely delivers a series of reporting and dashboard tools to help you understand your product mix and act accordingly. Decide which items remain on your shelves, and which items don't make it into the store. Which items turn over more quickly than others? Are items priced incorrectly, either not moving as quickly or not earning the gross margins that they could? With the Purchases vs. Sales Variance Report, you can answer these questions and take





corrective action. Identify slow or non-moving items and remove them from your shelves, implement a repricing strategy, or change the physical location of the item in your stores. Run this report against a particular store or against your entire organization. After a few short weeks of fine tuning, you'll begin to see improved inventory turnover.

With the Item Movement History Report, you can zero in on the performance of individual products. Which items are generating the highest sales? Which items are generating the highest profits? At which stores? The Item Movement History Report allows you to uncover the % of total sales and % of total gross margins for each product tracked at item level. Discover which products operate as loss leaders and which products are generating the highest profits.

Together, the Purchases vs. Sales Variance Report and the Item Movement History Report offer tremendous insight. Are there items that do not move as quickly (Purchases vs. Sales), but offer higher gross margins per sale (Item Movement History)? Are there items that offer little or no margins (Item Movement History), but bring customers into your store (Purchases vs. Sales)? Leverage your sales and purchases history to make informed decisions on how to maximize your floor space. But what about products you've yet to consider?

With iRely, you aren't limited to making decisions based on internal data. iRely allows you to store, cross reference, and track NACS categories alongside your own. Compare your performance with industry performance. Are you earning more, less, or in line with what your peers are earning? If less, why? Does your store location present challenges unique to you (state border, urban, rural, highway, etc)? Are you offering the correct product mix? Are there new items you need to consider? Are products not getting the necessary exposure in your store? By comparing your internal data to industry benchmarks, you'll be able to answer these questions and more.

## Control Shrink

Are items leaving your store without passing through the register? For some, shrink is a subject better left alone. No one enjoys suspecting loyal customers and employees of theft or implementing anti-theft measures that leave customers and employees feeling unsafe and distrusted. iRely allows you to take a step back, find out to what degree you have a problem with shrink, implement some basic but key anti-theft measures, and decide whether or not more drastic and costly anti-theft measures are necessary. If you're not doing it already, the single most cost-effective way to reduce shrink is to begin scanning at the register. Scanning eliminates "sweethearting" and other non-authorized pricing at the register, intentional or not. It actually improves customer service and

iRely POS Integrations	
Vendor	iRely
Verifone	✓
Gilbarco Veeder-Root	✓
NCR	✓
Wayne Fueling Systems	✓
Pinnacle Corp.	✓



employee morale by reducing customer wait times and automating employee routine tasks. However, implementing scanning at your stores does not guarantee immunity against theft in your stores. POS systems have built-in tools, such as voids, refunds, and error corrects of which a smart thief can take advantage. For this reason, iRely integrates with all major Point of Sale solutions including Verifone Commander, Gilbarco Passport, and NCR Radiant, giving you the tools to quickly identify theft and take necessary action, saving you money.

iRely analyzes POS and inventory data to ensure that you're receiving your margins on every item leaving your stores. Use physical inventory counts to identify high-risk merchandise and begin tracking these at item level while conducting the more frequent shift physical counts. This sends a clear message to customers and employees that you're paying attention to your merchandise, but without incrimination. Combine these procedures with powerful reporting tools, and you'll be able to quickly identify problem employees and customers and take proper action.

Another commonly overlooked area of shrink regulation occurs at the vendor end. Did the vendor accidentally load the wrong items on the truck? Did a driver unload the wrong inventory or leave some on the truck? Were the wrong prices included on the invoices? By scanning in inventory and sending data electronically to the home office, you can be sure you're paying for what you received at the correct price.

**Are you certain you are achieving the margins you want for every item in every store? iRely gives you the tools you need to efficiently and effectively set and manage the margins of every product in your store. Mass update price changes across your entire organization or manage it by store, groups of stores, or by any category within a store. Make sure that you, not your vendor, are in control of your margins.**



## Pricing Control

iRely gives you the power and the flexibility to manage your prices to ensure you're attaining the highest margins possible from every item in your stores. Manage pricing at item-level or by department or both. With iRely, you don't have to be locked into one system or another. On key items where margins are most susceptible to theft and pricing changes, track items by item-level and save time by tracking the rest of your products by department.

iRely operates a centralized pricebook that gives you complete pricing control over your entire organization. No longer do you need to adjust prices at each individual store, tying up registers. The larger your organization, the more profound the time savings. iRely allows you to update your pricing across the entire organization, by store, by group of stores, and at individual levels within the store, such as family, class, department, and individual UPC, saving time and money.

iRely allows you to automate your sale prices and complex pricing schedules, such as mix and match, 2-for-1, and combos. Be sure you're not losing margins by forgetting to take items off sale price by setting special pricing expiration dates. In addition, iRely ensures your store signage and staff are up-to-date with current pricing. iRely offers a Pricebook Planning Guide that informs store managers of which products are going on and off sale reminding them to remove outdated store signage; thereby, eliminating the need for price adjustments.

Promotional prices are set up in the home office and disseminated to the store level with the same power and flexibility of regular pricing. Upon sale of promotional items, iRely automatically adjusts your retail inventory to reflect the adjusted margins, keeping you in control.

Protect yourself against heavy fines associated with breaking state and local legislation on the sale of goods. iRely allows you to store

information on Blue Laws and customer age requirements. This information will then be sent to the POS and flag cashiers when they attempt to sell a restricted item.

## Complete Margin Control

With iRely you have complete control of your margins, not just your prices. Retail Price Adjustments is an iRely specific tool that allows you to automate your margins based on rules you set. Do you want to achieve a 38% margin across a family of products? Do you want to ensure a particular amount of profit on a particular UPC? iRely makes these profit goals a reality.

Set margins based on criteria, such as target margin, cost plus amount, cost plus percentage, sell plus amount, sell plus percentage, sell minus amount, sell minus percentage. Set beginning and ending dates to make sure you never miss out on a penny.

iRely gives you complete control over your margins across your organization. Apply margin rules to any group of products, including store, region, state, district, vendor, department, manufacturer, family, class, and retail UPC.

Item List ID	Description	Qty	Price
1	Pepsi 20 Oz	2.00	1.50
5	Frito Large Bags	1.00	1.25
8	Sathers Candy	1.00	1.00

Sample Promotion Configurations



## Gross Margin Optimization

After you have automated pricing across your stores, you will be able to focus more of your attention on optimizing your gross margins. Do you know the price at which your customers will stop buying any one product in your store? With iRely, you can quickly and systematically uncover the price elasticity of key products. By applying retail price adjustments and checking progress through the Item Movement History Report, you can uncover the optimal price for key products in your markets.

For example, one customer who sold a proportionally high number of cigarettes, experimented with the price elasticity of non-brand name lighters. Each week, he applied a price definition that raised his margins by a specific amount. He did this for several weeks until his sales on that particular lighter dropped off. He knew he had found the optimal gross margin. After backing off the price to the prior week's, he found he was earning an additional \$5700 annually per store. This example is one of many customers who have uncovered tremendous profit that they were otherwise overlooking.

### How Much Can I Increase My Gross Margins with iRely?

#### Assumptions:

Average Monthly Sales Per Store: \$100,000

Average Gross Margins Per Store: 40%

#### Scanning

Reduce Wait Time*	0.35%	\$ 140
Eliminate Sweethearting	0.25%	\$ 250
Eliminate Clerk Pricing Errors	0.25%	\$ 250
Deter Employee Theft	1.00%	\$1,000
Monitor POS Loopholes	0.25%	\$ 250
		<u>\$1,890</u>

#### Pricebook Management

Automate Vendor Price/Cost Import ensuring accurate price adjustments	0.25%	\$ 250
Eliminate unauthorized changes by paying off contract prices	0.25%	\$ 250
		<u>\$ 500</u>

#### Price Definitions

Ensure gross margins on key items	0.75%	\$ 750
Find price elasticity optimal gross margins	0.15%	\$ 150
		<u>\$ 900</u>

#### Inventory Optimization

Replace dormant items with fast movers*	0.25%	\$ 100
Benchmark against NACS Categories*	0.15%	\$ 60
Eliminate vendor shrink	0.25%	\$ 250
		<u>\$ 410</u>

**Total Additional Monthly Revenue Per Store: \$3,700**

*\*Increase in sales. Multiplied by Average Gross Margins.*



At iRely, we see ourselves as more than a software company. We bring innovative solutions to our customers' day-to-day operations. But, we don't just do it once. We believe it's our role to do it year after year. That's why when you partner with iRely, we continually bring technology and services together to increase your return on investment, simplify business processes, and drive profit to your bottom line.



## Technology

iRely views technology as a tool – a means to an end, but not the end itself. Although we employ the most powerful tools available today (.Net/HTML5, C#, JavaScript, MSSQL), we know today's technology will one day be obsolete. That's why we have deployed three-tier technology and created what we call our 100-year plan.

**Three-Tier Technology** means that we have separated our presentation layer (the screens you interact with) from our business logic (the program code) and from our database (where the information is stored). What this means for you is that when new technology emerges, we can quickly change out one layer without having to rewrite the entire program. Ultimately, you get newer technology, quicker, and with fewer errors.

**Do Business Electronically:** In a world of cell phones, tablets, and constant access to the internet, doing business electronically is expected. That's why iRely products do just that. We let you capture a customer's signature, attach it to an invoice, and let that same customer pull it up as PDF online, 24/7. At a later date you can EFT/ACH that customer for payment. On the vendor side, we allow for features such as vendor imports, rebate exports, and positive pay. And, with our web-based dashboard product you can keep tabs on all these transactions and more.

**iRely's 100 Year Plan** is a unique approach in the software industry. We plan to be around 100 years from now, so how we proactively approach technology change is different from our peers.

Since iRely understands technology change is inevitable, we build the cost of those changes into our user membership program. We also allow customers to make those changes at their pace, so they can plan software upgrades around planned hardware upgrades or pressing business needs. And, we don't force entire new versions that require retraining. We bring programs live in a deliberate, gradual manner that meets the pace of the industry.

## Software Deployment

iRely offers three deployment methods: SaaS, Hosted Server, and On Premise Server. Due to the flexibility our technology offers, we let you decide what best fits your organization.



**SaaS or the 'Cloud'** allows you to lower your up-front costs and access your software from anywhere with an internet access. There are many advantages of SaaS including predictable costs, rapid configuration and deployment, vastly reduced IT management, improved security, and scalability. The SaaS model allows the iRely team to quickly and easily deliver software upgrades to our customers and is the preferred model for customers just looking to get started with ERP.

**Hosted Server** is nearly identical to SaaS with two key differences – ownership and up-front cost. With iRely's managed services model, you can purchase the software up-front, or apply part of your monthly fee towards ownership. By owning the software license, you pay a lower monthly fee than you would with SaaS. Also, if you decide later that you'd like to move the software in-house, you can do that without having to purchase the software. Otherwise, you still have the advantages of outsourcing the hardware and security management.

**On Premise Server** is the traditional model of owning the software license and deploying it on a server. This continues to be a popular option due to the advantages of software ownership, no hosting fees, maximum hardware/networking control, and reduced risk from internet outages. iRely uses industry-standard hardware, making this a cost-effective option, especially long-term.

## Implementation

Converting from one software package to another is a challenging process for any business. That's why iRely has created an easier implementation process that is custom tailored to the exact needs of your organization. With our modular solution approach, our implementation team can rapidly tailor an optimized implementation for your business.

### ■ Business Process Review

The first step in a successful implementation at iRely is our Business Process Review. Our experts work hand-in-hand with your team to evaluate and then map your business processes, compare them to industry best practices, and then design an implementation solution that will work best for you. We discuss goals, resources, expectations, and bring key people from both our teams around the table to ensure everyone is focused on the same success factors. We then generate a document that describes your "to be processes", clearly defines key system configuration parameters, and identifies any changes required for your desired flow. The BPR process enables us to prepare a solid implementation plan, ensures proper costing of the project, and greatly reduces project risk.

### ■ Data Conversion

Want to bring data from your old system into iRely? iRely offers data conversion services that allow you to save time and reduce data entry errors. If you can print your information in a report, we can import it into iRely.



## ■ Project Management

iRely has an entire team dedicated to project management. This team will help you every step of the way through your implementation beginning with the Business Process Review, through installation, training, Go Live, and Month End. It's their job to ensure your journey to becoming a full iRely customer is as smooth as possible.

## ■ Training

iRely offers training services in a wide variety of formats: online, phone, and in-person. During the implementation process a custom training program will be created for your organization. After implementation, iRely continues to provide training services as needed.

## Quality

iRely is setting the standard in assuring software quality through its User Acceptance Program (UAP). We have developed a systematic approach to ensuring a quality product that begins with the customer defined processes identified during the BPR. Our QA engineers then take those processes and develop customer-specific tests using the latest in software testing technology. Prior to each new product release, our QA team automatically runs these tests on the new system using the customer's own data – thereby guaranteeing confidence that the new release will work as intended in the customer environment. UAP is proven to reduce the number of post-go-live issues and dramatically reduces the amount of testing your users need to do, which in turn saves you both time and money. There is simply no better approach to delivering the highest quality enterprise software.

## On-Going Support

When you go live with iRely's system, it does not mark the end of a relationship, but rather the beginning. We do this through our User Group Membership (UGM) program. This program includes phone support during office hours, an online web portal, software upgrades, online training videos, and more. In addition, as part of this program we keep you informed with software and technology changes that impact your business as well as tips on getting more from your investment. We do this through regular emails, quarterly newsletters and an annual conference.



At any point in time, can you gauge the success of your entire organization? iRely allows you to wrap your arms around every aspect of your business in a single, unified system. Whether you operate convenience stores or distribute petroleum products, or both, iRely offers a complete and comprehensive solution to manage your entire organization.

## Core Financials

Central to iRely's "One Solution" model are its Core Financials. iRely offers a powerful, complete set of financials with the power of stand-alone systems, but at a level of integration only products created by a single developer can achieve. From General Ledger to Accounts Payable, from Payroll to Time Entry, iRely has you covered.

**General Ledger.** iRely General Ledger categorizes and summarizes your accounting data by both units and dollars, so you can easily review various expense or income categories. Compare these categories to budgets or prior periods for up to 5 years. This vital management information can be used to increase the profits of your business by allowing you to spot and reinforce income-generating areas, eliminate waste, locate areas which are over budget, and implement actions for correction. Drill down to the source transaction in iRely C-Store from iRely GL, eliminating time spent on researching transactions. Eliminate time-consuming month-end entries by allocating overhead costs to departments based upon percentages.

**Accounts Payable/Cash Management.** iRely Accounts Payable/Cash Management imports electronic vendor invoices and inventory scans taken at the store, saving you time, eliminating duplicate entry, and ensuring you pay for items you actually receive. iRely also offers ACH, which allows you to save on checks and postage, and Positive Pay which ensures that only the checks you write get cashed by the bank. Our recurring voucher entry screen allows you to eliminate manual entries on recurring invoices. Allocate expenses on the voucher level from an account template, so you don't have to make time-consuming entries to allocate cost in the General Ledger. Reduce entry errors by matching invoices to purchase orders, ensuring you pay the appropriate amount. Perform month-end bank reconciliations electronically to clear your checks and save time.





**Payroll.** iRely Payroll helps you maintain employee payroll information, calculate taxes, handle voluntary deductions, and print payroll checks. Eliminate tedious manual payroll calculations and save time gathering and preparing quarterly and yearly tax information.

**Time Entry.** iRely Time Entry allows you to track employee hours electronically, either through your Point of Sale or through your store computer. Hours are tracked and then sent to the home office for Payroll processing. iRely Time Entry eliminates the need for a time clock and subsequent reentering of information at the home office.

## iRely's Petroleum Distribution Software

Do you distribute petroleum products, operate card lock, have unattended fueling sites, or repackage oil products in addition to operating stores? For petroleum retailers with wholesale operations, our industry-specific solution is a must. Our petroleum distribution software simplifies every aspect of the petroleum wholesale business effectively and efficiently. It tracks federal and state excise taxes, as well as, state and local sales taxes, even if you are operating in two or more states. It provides up-to-the minute company and customer positions and delivers accurate detailed reports in seconds. Both iRely's Petro Distribution and C-store solutions are proven stand-alone solutions for even the largest organizations, but together they create an unrivaled complete solution for the petroleum wholesaler and retailer.

## Mobile Billing Capabilities

Our in-truck billing solution allows petroleum marketers and oil jobbers to automate their reporting functions while improving customer satisfaction. By eliminating hand entry of invoices and payments, PSR and office staff are equipped with the tools they need to increase their efficiency and productivity while reducing costly errors. Current customers have experienced a 90% gain in efficiency at the home office and an additional 10-20% increase in driver efficiency! Many of the top state drivers are mobile billing users distributing between 1 and 2 million gallons a year. As with all iRely products, our mobile capabilities are seamlessly integrated with all of our other products to create a single solution.



### Example:

Chuck is a tankwagon driver at a petroleum distributor of home heating and farm accounts for a large Indiana cooperative. When he began, he was distributing 0.7 million gallons. Thanks to the efficiencies gained through Energy Trac, Chuck now distributes over 1.7 million gallons a year. Chuck's story is not uncommon. Several drivers using our mobile billing solution have achieved sales in excess of 2 million gallons a year!

# iRely Simplifies Your Complex Business Processes.

- Maximize store margins
- Control inventory
- Minimize shrink
- Streamline daily operations
- Consolidate multi-store information



## About iRely

iRely's commitment to customer success has made the company a global leader in digital transformation, providing best-in-class software for commodity management, petroleum distribution, retail, grain operations, and agribusinesses. Headquartered in Fort Wayne, Indiana, with offices in Chicago, New Jersey, Texas, California, London, Bangalore (India) and Makati City (Philippines), iRely has nearly 40 years of experience delivering end-to-end enterprise resource planning (ERP) and commodity trading and risk management (CTRM) solutions to simplify complex business processes through a single point of truth. iRely has leveraged its deep industry experience and expertise to build genuine, lasting partnerships with over 500 customers in more than 25 countries.

For more information, visit [iRely.com](http://iRely.com).

## See All Our Industry Solutions:

### PETROLEUM DISTRIBUTION

Wholesale Transports      Retail Propane & Fuel Delivery  
Unattended Card Fueling      Lubricants Distribution  
Convenience Stores

### COMMODITY MANAGEMENT

Procurement, Trading & Risk Management  
Food & Beverage Manufacturing

### AGRICULTURE

Grain Origination      Feed Management  
Crop Inputs & Agronomy      Ag Retail

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