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FALL 2014



## Don't Be Left Out in the Cold

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Last winter's propane shortage tended to affect fuel companies and energy departments across the Midwest in a variety of ways: in some cases, customers that were not enrolled in budget payment programs were unable to afford the cost of filling their tank to the standard 85%. In other cases, companies near pipelines where rationing was in effect were often unable to completely fill a tank during any delivery, as they needed to conserve their on-hand propane inventory.

From a delivery perspective, this situation posed a great number of logistical problems – not just in acquiring and billing for propane, but in the frequency of deliveries to each tank. Not being able to fill a tank to its full level means that more deliveries need to be made to each tank in order to prevent the tank from running out of fuel completely. With the increased frequency of deliveries, tracking where each tank is at and when it will require another delivery

becomes a very complex and critical business requirement. Fortunately, OAKLAND Fuel Manager was up to the task and served our clients well during this time.

Oakland first released our Fuel Manager software in 2003, and since that time it has provided and continues to provide many energy-related organizations with a reliable method of generating delivery schedules. Fuel Manager is able to create schedules on a tank-by-tank and route-by-route basis, utilizing one of two different strategies:

1. Frequency-based, or waiting a set number of days between each delivery to the tank
2. Usage-based, or analyzing the cold-weather usage history for a tank and predicting when the amount of fuel in a tank will next fall below a certain threshold

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## What's New in Oakland's Management Suite

**Aaron Shaw**  
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At Oakland's 2014 summer conferences Tim VandeKamp and Dan Oakland demonstrated the latest enhancements to OAKLAND Management Suite (OMS). OAKLAND Management Suite is different than simply exporting your data to Microsoft Excel. Instead it allows you to connect your Excel spreadsheet directly to your OAKLAND System, and with a click of a button, you are able to refresh and see the latest data appear within your spreadsheet. Users are able to enhance their OMS-connected spreadsheets with custom graphs, formulas, and reports. Some users are even using these tools to forecast

budgets and sales for the upcoming year or to pinpoint historical trends. Not only is the data live from your system, but you can also drill-down and see the supporting details - all from the comfort of your own Excel spreadsheet.

One of the Excel spreadsheets that Dan Oakland created drew quite a bit of attention. This spreadsheet showed sales trends by department, graphing a sales forecast based on historic trends pulled from the past 36 months against actual sales for the current fiscal year so far. Once spreadsheets like this are created you simply save them, and each time you open them up they refresh with your latest figures. There is no more time wasted exporting the raw data, importing it back into your spreadsheet, and then

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## Events

### Holiday Closings

- **Thanksgiving**  
Thursday, November 27<sup>th</sup> &  
Friday, November 28<sup>th</sup>
- **Christmas Eve**  
Closing at Noon
- **Christmas**  
Thursday, December 25<sup>th</sup> &  
Friday, December 26<sup>th</sup>
- **New Year's Day**  
Thursday, January 1<sup>st</sup>

## Saying Goodbye

Many of you know our beloved John Lounsberry passed on June 5th. John was a valuable employee to Oakland Corporation. His dedication to supporting you was something he loved doing. Our office is forever changed for the better having worked with John for 17 years. It is Oakland's hope that John's desire to provide



exceptional service uniquely touched your life too. Our large meeting room has been named the John Lounsberry Conference Room in honor and memory of him.

## IABC Tours Oakland

Oakland Corporation recently welcomed the Iowa Association of Bookkeepers for Cooperatives (IABC) to our office for a meet-and-greet reception.

The IABC held their annual meeting in Ames September 8th and 9th.

Members from across the state gather for networking purposes, speakers and presentations regarding relevant topics to their profession. The IABC has been in existence since 1962.

Members of the IABC were welcomed at the Oakland Corporation offices on Monday, September 8th. An ongoing presentation was provided regarding our products and services. Facility tours were given by Terry Gjersvik, Arlen Oakland, & John Mogren of Oakland Corporation. Oakland employees enjoyed meeting all of the IABC members, many of whom are users of our software.

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The frequency-based strategy mentioned above is a simple matter of determining whether enough days have passed for another delivery to be scheduled. The usage-based strategy requires a much more complex approach to scheduling upcoming deliveries, and that will be the focus of this article.

For its more complex, usage-based strategy, OAKLAND Fuel Manager uses degree day forecasting to predict the current level of fuel remaining in each tank. Degree day forecasting is a calculation method that simply measures the level of fuel within a tank at two separate points in time. Assuming that no fuel has been added to the tank, the difference between the two levels is the amount of fuel that was used during that time period. When we compare how much fuel was used to how cold it was during that same time period, it is possible to estimate very accurately what level that tank will be at today as long as we know how much fuel was in the tank when we left it and how cold it has been since the last delivery.

A "heating degree day" is a calculated temperature value that answers the question "how cold was it?" during a 24-hour period. Technically, this number is a benchmark of how far the average temperature that day was below the "base" temperature of 65° Fahrenheit. For OAKLAND Fuel Manager, the most important thing is that an accurate record of degree days is available so that it can predict current tank levels across all routes.

Historically, getting degree days into the system has been a time-consuming drawback to OAKLAND Fuel Manager – it works great, but degree days had to be manually entered into the system each day. With the latest version 4.59 update of our software, we can now automate the degree day entry process. Each night, after local weather stations at airports, schools, and so forth, report their final temperature readings for the day, our automated process requests this degree day value and inputs it into OAKLAND Fuel Manager – always accurate and entirely hassle-free. It runs over weekends, holidays, and even catches up on its own should a weather station take longer than usual to post its official temperatures.

While it might seem a relatively small improvement at first, we believe this new feature will allow the degree day forecasting component of OAKLAND Fuel Manager to really shine. By streamlining and reducing the work it takes our end users to generate delivery forecasts, fuel companies and energy departments can focus on growing their customer base and improving the efficiency of their operations.

## Welcome to Our New Employees

**Lisa Sterner** joined the Oakland Team on October 15th in the Accounting Support department. She comes to us with 30 years of grain and agronomy experience in southeast Iowa. She has a degree in accounting from SCC in Burlington.



She and her husband, Mark, live in Wapello and have two daughters and two grandchildren with another one due in January. In her spare time she enjoys spending time with the family, especially the grandkids, and quilting.

**Marilyn Behne** returned to work at Oakland on August 18th as a member of our Development Team.



She started working in development at Oakland in 1988 and 1989, and is a graduate of Iowa State University, with a Degree in Computer Science. Marilyn has 15 years development experience in addition to her years with Oakland.

She and her husband, Rock, have two girls, the youngest of which is a senior in high school, and they live in Anderson, South Carolina. She enjoys reading, quilting, and genealogy.

## New Clients & Mergers

### New Clients

- Le Mars Agri-Center - Le Mars, IA
- Cooperative Gas & Oil - Sioux Center, IA  
[www.coopgassc.com](http://www.coopgassc.com)
- Schaeperkoetter Store - Mount Sterling, MO

### Mergers

- Farmers Win Coop - Previously Fredericksburg Farmers Cooperative, Fredericksburg, IA & Winneshiek Cooperative - Decorah, IA  
[www.farmerswin.com](http://www.farmerswin.com)

*"What's New in Oakland's Management Suite"  
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recreating the final document every time you need it. Our Management Suite offers a hassle-free way to automatically keep your spreadsheets up to date.

Here are just some of the latest templates now accessible in OAKLAND Management Suite:

- Grain Daily Sales and Purchases
- Asset Manager Information – ability to create P&L by vehicle
- Inventory Product Status Report
- Beginning & Ending Inventory, Sales, and Purchases
- Margins that are automatically calculated and included
- Aging Report with option to view customers exceeding their credit limit

When we first introduced our Management Suite product in 2012, we weren't exactly sure what sort of information our users wanted to see live. Our development staff worked with client companies

that became early adopters of this technology, and with their help we were able to come up with the ideas for these key templates. Because the product was in its infancy, we waived maintenance on the product until the beginning of 2014. The yearly cost of the maintenance is fairly low and considers the total user count of your OAKLAND system. This maintenance provides you with

the support and continued development of this great product.

This winter John Mogren will be reaching out to those clients who currently don't have OAKLAND Management Suite. We want to make sure our clients know the power of this tool. If you are interested in learning more, or have an idea on what information you'd like to see next, please give us a call or send us an email.



**Bill Buckels** joined the Oakland team on August 18th as a member of our Accounting Support department.



He and his wife Ruth live on the family farm south of Story City and are foster/adoptive parents to numerous children, eight of which are still at home. He graduated from Iowa State University, with a degree in finance and worked for a farm equipment finance company in Johnston for 25 years.

In his spare time, along with being an avid ISU fan, he enjoys classic cars and tractors, farming, flipping houses. He also raises livestock, including purebred Welsh Corgi and German Shepherds.

**Ann Healy** will join the Accounting Support department on November 17th.



She and her husband, Mike, have been lifelong residents of Story City. Ann and her husband have four adult sons and two grandchildren.

Ann attended Iowa State University and brings 30 plus years of accounts receivable, accounts payable and payroll experience to Oakland.

In her spare time, Ann enjoys spending time with her family, gardening, following Iowa State, shopping, and entertaining family and friends.

**Cande Coulter** became part of the Oakland team on August 11th as our Administrative Coordinator.



She comes to us with more than six years of experience. Some of her duties include coordinating the newsletter, general administrative support, marketing and sales assistance, client hospitality, and website management. She and her husband, Todd, are the parents of three grown children, and have one grandson. Originally from Indiana, Cande has lived in Story City for four years.

In her spare time she enjoys baking, camping, and spending time with the family and friends.



**Tim Vande Kamp**  
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# New Version Highlights

We continue to add reports throughout the system that offer the view before print option. Examples of this option on the recent release include: Customer Sales by Zip Code, Monthly Sales by Customer and Custom Applied Sales. We will continue to add other reports that utilize this feature as time permits. If you have suggestions as to a certain report you would like to see sooner

rather than later, please let us know. We have reduced the chance of making a pricing error on a Point of Sale ticket by allowing a min/max price on an individual product. In addition, you will now have the ability to set over/under percent limits on product prices. This can be done by the product, by the category, or set by the company. Users entering Point of Sale tickets will see a warning if the price is out of this range. Blend sheets can now be marked as "re-spray" to help generate reports for chemical companies that assist in the

cost of re-spraying. Blend sheets can also now be marked as blended, but not yet billed, to get a better picture of inventory. These two options are on the Fertilizer menu as "Mark as Blended" and "Mark as Re-Sprayed".

The Stock Report in Patronage has some new features. The report will now allow for more than seven stock codes to be reported. Also, when printing this report in birth date order, and including accounts without a birth date, each year reported will be subtotaled.

## Did you know Oakland is hiring?

As Oakland continues to grow, we are looking for qualified people to join our team. For a listing of open positions please visit <http://www.oaklandcorp.com/careers.aspx> or email [positions@oaklandcorp.com](mailto:positions@oaklandcorp.com)

www.oaklandcorp.com

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