

Enhancements to Notes

There are two new features available in notes that will improve its usefulness: *Note Assignment* and *Note Searching*.

You can assign ownership of a note to an individual and that person can be reminded to follow-up on the matter at some future time.

To assign a note to yourself or someone else, simply open the note detail window and select from the drop-down list next to “Assigned To:”

Check the “Remind On” box and then pick a date if you want the note owner to be reminded about this note.

Any time you log into DRM Windows, you will be alerted about any past due Notes that have assigned to you. If you like, you can choose to review that list right then, or alternatively review it later by choosing Note Detail from the Reports menu.

Note Detail for Acct #6-1

Acct # 6 AGNES GALLAGHER 1414 MAIN ST CHATHAM MA 02633	Call	Site # 1 AGNES GALLAGHER 1414 MAIN ST CHATHAM MA 02633	Srch/Sort:
Ph 1: 945-3659 Ph 2: Fax: Bill: DEFAULT		Ph 1: 945-3659 Last Chg: 03-26-2012 Last Crdt: 04-14-2012 Last Burn: 03-26-2012	Cur: \$0.00 30: \$0.00 60: \$0.00 90: \$0.00

Date: 7 / 5 / 2012 Assigned To: KP - Keith
Flag Sticky Remind On: 7 / 11 / 2012
Type: MISC - Misc Note
Details:
Note ownership and reminder dates are pretty useful. They will definitely help you with following-up on important tasks.
Print Close

Searching through notes with the Note Detail wizard is even easier and more powerful. Similar to other drill-down reports, when you open the notes report wizard and establish your criteria, you can choose to display the relevant matches in a list that you can then scroll-through or drill into. You can also export this list to an Excel spreadsheet, which will display additional information. When searching for a note, the note date is now ignored unless you check off “Ignore Dates” and specify a date range.

New Feature: Daily Finance Charges

Instead of waiting until month-end to run finance charges, you can choose to perform this process daily and charge an account as soon as an invoice falls over 30 days past due (or whatever your criteria is coded as). You can then mail/email daily statements to these accounts.

Use the option “Posting / Finance Charge – Perform Daily” to turn on this mode of processing. You will be reminded to run Daily Finances every day but don’t worry if you forget as any past due accounts will simply be included next time.

Bear in mind that only one finance charge will be automatically posted to an account during a 30 day interval, so some past due invoices may not be finance charged immediately. Nonetheless, you may find this new process to be a useful tool for dealing with accounts who are slow to pay.

New Feature: Account Source

This is a new field on the site screen that lets you to reference where a new customer came from. For example: Newspaper Ad, Website, Referral, etc. It will help you monitor the success of your various marketing campaigns.

To set-up the various codes to select from, navigate to the Utilities (F7) / More (F9) / Account Source (F3) screen. Here you add new codes and also see at a glance how many accounts are associated with each code.

Similar to Account Status, you can filter on and display this field in a Custom Report. Look for the fields called “Source” and also “Src#”.

Enhancements to Work Orders

Previously the work order screen was simply a tool for printing work orders, and you generally used the invoice as the place to record any details/notes about the work done. Now work orders can be saved and the screen includes multiple fields to help you document the job. In addition, work orders can be dispatched and scheduled using the new DRM Dispatcher program.

The first change you'll notice when you choose "Work Order" from the Daily Work menu is that the work order screen doesn't open immediately as before. Instead, you see a list of the customer's historical work orders, similar to seeing a list of transactions on the View Tran screen. To start a new work order, simply choose "New", or choose "Edit" to update an existing work order when the job is underway or completed.

The first step is to pick a **Job Code**, which is a new field just for service. Manage your list of Job Codes from the "Utilities (F7) / More (F9) / Job Code (F9)" menu. Each Job Code record includes the following fields:

- **Seq #** Similar to Posting Words, this number simply arranges the list of job codes.
- **Job Code** This identifies the general purpose of the work order. It prints on the work order and also shows on the scheduling calendar.
- **Description** Additional information to describe the purpose of this job code. (optional)
- **Posting Word** Use this to link a specific Job Code with a more general Posting Charge Word. For example, you might have separate Job Codes for "NO HEAT" and "NO HOT WATER" but have a more general posting word called "SERVICE" which is included in the customer's schedule service list. Link both Job Codes to the same posting word.
- **Calendar Only** You can elect to reserve certain codes just for use in the scheduling calendar. For example, you can setup codes for "VACATION" or "SICK" to block-out times on a technician's calendar, but these codes shouldn't be used for a work order and won't be listed.

From the Work Order screen, in addition to the Job Code, the following information can be provided:

- **Job Info 1 & 2** Two lines up to 64 characters each of further instructions to the technician that prints on all Work Order forms (Multi-part and Laser)
- **WO #** The work order reference number will be automatically filled in if left blank when you save the work order. This number prints on blank laser work orders. The Dot-matrix multi-part forms generally have a pre-printed number, and you should edit the work order later to reference this number.
- **PO #** A field to reference a purchase order # if the customer provides one.
- **Job Date** When the work was performed. Can also be used to help schedule work on the new Dispatch calendar.
- **Duration** How long the job took (hours and minutes). Can also be used to block out a certain amount of time on the scheduling calendar.
- **Invoice #** Choose "Pick" to link-in the invoice for this job. Once an invoice has been linked, you can choose "View" to see the details.
- **Lead Tech** Identify the principal technician. Can also be used to suggest a tech when dispatching from the calendar. If you are using the calendar and multiple technicians worked the job, you will see each listed in the Appointments section displayed at the bottom of the work order screen.
- **Status** Choose from the list ("Completed", "In Progress", "On Hold" etc.) If you are using the calendar, it will help you see at a glance that a job has been "Scheduled" for this work order.
- **Priority** Up to 9 different color-coded values to select from to help dispatch the work. You can edit the list of codes and colors in the new Dispatcher program.
- **Billing** Choose from "Contract", "Invoice", "Warranty". Use this in conjunction with the Invoice # to quickly see any work that needs to be billed.
- **Dispatch Queue** This field is really only useful if you are using the Dispatch Calendar. You can set-up various queues to better manage work that needs to be scheduled. This is described further in the Dispatcher manual.
- **Notes** There are six categories to help you organize any additional information you want to save. *Request Note, Office Note, Problem Found, Resolution, Recommend, and Equipment.* You can only print these notes on specific versions of the Laser Work orders.

New Feature: Post Special / One Time Transaction

There are two scenarios where you will find this new feature to be useful:

1. Post a one-time transaction to a group of accounts. For example, post a monthly customer service fee to accounts who elect paper billing instead of email statements.
2. Post a balance zero-ing adjustment transaction to wipe out any small balances.

Access this new screen by first opening the Month-End Processing screen, and then choosing “Post Special Transaction”

Post One Time Transaction

Step 1. Build a Quick Pick list of accounts to post to. Show Quick Pick
41 Accounts Selected

Step 2. Post specific amount Zero the Balance

Step 3. Set-up the transaction to Post.

Charge Credit

Posting Word: Pick

Category: Regular (R) Budget (B) Prepay (P) Fuel Asst (F) Use the Account's Default Category

Amount to Post: 0.00 Posting Date: 4/18/2012

Comment to Post:

Post Transactions Cancel

- Step 1. Create a Quick Pick list to include all the accounts you want to post to.
- Step 2. Decide what mode to use: Post the same specific amount to each account, or a variable amount to Zero-Out the account's balance.
- Step 3. Pick the appropriate Posting Word and choose the category (R, B, F, P or default) it should post as. Adjust the amount to Post if necessary. Specify the Posting Date Provide an additional posting comment (optional)
- Step 4. Click Post Transactions to start the processing.

Notes for Zero-ing Balances

You have to work with specific groups of balances separately. For example, Regular Credit balances need be processed separately from Prepay Charge balances. Start out by building a Quick Pick list for one of these groups. For example, select all accounts with a Regular charge balance less than \$1.00. You will want to issue a credit adjustment to clear these balances. You won't be able to choose a specific amount to post since it will vary from account to account, but DRM will figure it out. You'll find this to be a useful task to add on to your end-of-year procedure.

Enhancement to Fuel Pricing

Your fuel pricing is now linked to an effective date. Simply input the date and revised pricing when they change. Use the Fuel Price History report to display historical prices. Even if you don't utilize Retail Pricing, you may still find it useful to input fuel costs as they change, as this information is used for the new Fuel Sales Profit report.

Enhancement: Billing Cycle

Previously, the Billing Cycle field allowed free-form text entry. Spelling mistakes and typos are a side-effect of this which can impact reports when you want to choose certain values. This field has been converted to a drop-down list. To manage the Billing Cycle code list, choose “Utilities(F7) / More (F9) / Billing Cycle (F4)”

The Seq # controls how the codes are arranged in the list. Similar to the Account Status values, you can assign various colors to the Billing cycle codes. You can see at a glance how many accounts are associated with each code. You can only delete an existing code if there are no accounts using it.

It's possible that you may have to perform some clean-up before you can start fully benefitting from this new code field. All your existing Billing Cycle values have been automatically converted to the new codes, but due to typos, you may see that you have 1200 accounts with a “DEFAULT” code and 7 accounts with “SEFAULT” etc. Follow these instructions to quickly correct the bogus codes.

- Start off with an empty Quick Pick list and open the new Billing Cycle Setup screen
- Select each mis-spelled code in turn and choose “Add Quick Pick (F6)”. Don’t delete the current quick pick list if prompted.
- Now you have a Quick Pick list of all the accounts who have bad codes.
- Open the Account Lookup screen and click the “Use QuickPick” checkbox, to limit your list of accounts to only the ones you want to fix
- Choose the first customer, open the Billing screen and correct the Billing Cycle
- After you save the record, press <down-arrow> to move to the next account. Rinse and repeat.
- You can now delete the unassigned codes.

New Feature: Email Queues to send multiple emails

You can now setup a workflow to send multiple email statements or invoices, instead of having to email each one separately.

First use the Billing Cycle field to identify which accounts want email statements. On the Statement screen follow your normal steps to set-up the statements to send but only select the Email accounts in the “Customers to Include” section. Choose “Print / Preview” if you want to review the statements before you email them but escape from the preview screen when you’re through reviewing.



In the “Email Options” section, click “Add to Queue” to add these accounts to the Email Queue. The email queue is similar to a Quick Pick list, as it belongs just to you and contains a list of accounts that you added. You can also View the Email Queue and remove accounts or add others. The queue displays a status for each account included “Pending”, “Sent” or “Error”

When you are ready to send the emails, click “Send Emails” and watch the progress as the Pending # counts down to zero and the Sent # increases. Once you start to send the emails, you can either walk away or open up a 2nd DRM session if you want to keep working while the queue is being processed.

Note about SPAM

Some email providers think that anyone sending a similar email to multiple addresses in a short period of time must be sending spam. From what we’ve seen, this is usually linked with how many emails they detect you sending per minute. If you start to notice time-out errors after you have sent a dozen or so emails, then you probably are using one of these vigilante providers and will want to slow down the process. Edit the option “Email settings / Delay in seconds when sending from Queue” to increase the gap in between sending each email. For example, with a value of 2 about 25 emails per minute will be sent.

New Reports

1. Credit Cards Transactions Submitted by Date. Choose to either print details about each individual sale or a daily summary grouped by Visa, MC, Discover, AmEx.
2. Fuel Sales Comparison by Period. Compare fuels sales between 2 periods. First choose the date range for the 1st period to report. This should be the most recent period. Selecting the dates for the 2nd period can be as simple as choosing ”Same Dates last year” or “Prior Month”, or you can override these suggestions. The report lists total gallons sold for each product broken down by (R,B,F,P) category, and shows the two periods side by side.
3. Fuel Sales Profit. This report utilizes fuel costs and discounts given to calculate the gross margin on each sale.
4. Tickets Printed with Balances. This report is identical to the Tickets Printed report, except that it prints Total Balance and Balance Over 30 instead of Tank Size and Last Delivery Date.

New Feature: Degree Day Forecast

From the Degree Day (F8) screen, choose “Forecast” from the menu to open the Degree Day forecast screen. Enter typical daily Heat and Water values for your region. You can update these numbers as often as you want according to short and long-term weather forecasts.

This information is used in conjunction with your actual historical degree day data to predict a date for the next degree day delivery.

For example, in the Fuel Scheduling screen, you can see the last fill occurred on 6/14 and the next delivery is scheduled for 6706 Water Degree Days. If you click on the red “Next” label, you will see that this is forecast for 10/3 or thereabouts.

Miscellaneous Changes

1. Voided Transactions are now hidden by default on the View Trans screen. To see them, simply click on the dropdown arrow next to the “Category” column heading and select “Show All.” If you prefer to always see the voided transactions listed, visit the “Utilities/Options” screen and edit the record “System/Show Voided Transactions by Default”
2. You can now print Contract Gallons Remaining on your meter ticket. If you want to use this feature, contact us with the best location on your ticket to print this information, and we will help you edit your ticket template.
3. **Three strikes and you’re out!** Use your meter ticket to draw attention to past due *regular* balances by potentially printing “XXX” next the balance. A single X shows the balance is Over 30 (or within your 2nd aging tier). Double X identifies the balance as Over 60 (or within your 3rd aging tier). Triple X identifies the balance as over 90 (or within your highest aging tier). Turn this feature on with the option “Printing / Meter Ticket – Print X for past-due balances.”
4. There is a new comment field for each of the 3 phone numbers on the customer information screens. You can type in up to 20 characters to better describe the phone number or provide an extension # for example.
5. The Auto-Post report now includes a summary section showing how many transactions are scheduled to be Auto-Posted each day. You will also be reminded about past-due Auto-Posting as you exit DRM.
6. The login screen now alerts you if your CAPS LOCK is on. This should help reduce password mistakes since the password check is case-sensitive.
7. The Delivery Route report has always reported the total number of stops on the route. Now it breaks that number down further by showing how many tickets are already printed vs. those that need printing.
8. There is a new Option to control the memo that is automatically selected when you open the Meter Ticket screen. Normally the default memo is selected, but this new setting will instead select the last memo you entered. To use this feature, edit the option for “System / Meter Ticket Screen – Use Last Memo instead of Def.”

9. Advanced Filtering helps you search your parts list for a particular item. In the Advanced filtering section, enter a few letters to search for. Click "Apply" to only see the parts that contain these letters *anywhere* in either the SKU or Description fields.
10. The phrasing of the budget payment Dunning message has been modified slightly for budgets that are Behind or Ahead. "BUDGET BEHIND BY \$120.00" prints instead of "SEPTEMBER BUDGET BEHIND BY \$120.00"
11. Speed up posting Credits. Up until now, except for budget payments, you have had to enter the amount of each credit to post. Now the balance due will automatically be filled in, and if correct you can simply press <Enter>. Note that this only applies to Regular transactions. If you prefer to revert back to the old way, simply edit the new option "Posting / Set Default Credit Amount to Balance Due for Reg."
12. You can now designate a minimum Finance Charge to post, for example \$0.50. If an account's past due amount is not high enough to generate this minimum charge, the finance charge will simply be skipped. Set this threshold with the option "Posting / Finance Charge – Minimum Amount"
13. Account # now prints on the Notes Detail report.
14. The issue associated with printing postcard messages to shared/network dot matrix printers has been resolved.
15. You can now use Customer filtering with the Tickets Printed report.
16. You can now print the Account Status on your meter ticket. If you want to do this, let us know the best location on your ticket to print this information and we help you edit you ticket template. Consider that there should be sufficient space on the ticket to print up to 10 letters.
17. You can now print the current date on your LetterWriter documents. Select one of the 2 special date fields from the available database fields and save it with your template. For example, SysDateLong prints "September 6, 2012". SysDateShort prints "09/06/2012".
18. If you use Posting Word Charges to manually post sales tax, you will now find their totals in the Charge Tax Summary sections of the Post and View Totals reports.
19. The Post Totals filter to show batches posted "Last Month" now correctly includes all batches posted on the last day of the month.
20. You can now make a Truck or Service Van inactive when you take it out of service. You will still be able to report its history but it won't be listed for new work.
21. You can now filter the User list. Inactive users are hidden by default. For example, you can easily list just Drivers or Service techs.
22. Delivery Information fields 3 and 4 can now be selected in Custom Reports.
23. The issue with not being able to see the complete tax amount on the Meter Ticket screen for certain screen resolutions has been resolved.
24. In the "Total Gallons by Month" Fuel Chart screen, any Ending Date you choose is remembered for the next account you visit.
25. You can now choose a specific T-Group for the Fuel Deliveries report.
26. The Site Info and Billing Info screens now display who last edited the record.
27. The "Fuel Totals by Month" report now includes a summary page for each Fuel Category (Heating Oil, Kerosene, etc)
28. The layout of the Fuel Purchases report has been modified to give additional space for the Supplier.