

Looking to the future...

Before you start learning about all the exciting changes you'll find in this version, here's a brief rundown of what's coming down the pike.

- *Built-in Credit Card Processing:* use DRM to authorize and post payments directly.
- *Improved Service:* keep a comprehensive service history for each customer. Edit a work order as work is done. Push a button to print an invoice for a completed work order and print a detailed notes section and more.
- *Inventory Module:* manage your parts and liquid inventories.
- *Parts Price List:* manage your price list whether you choose to use inventory or not.

As always we value your feedback greatly and will continue to use your suggestions to make the product even better.

New Features

Change to the Move Balance Screen in View Tran (F5)

You can move a balance from one account to another. Just like when moving a balance from one category to another, a total of two Adjustment transactions are created to offset each other, except in this case each account gets one of the transactions. The comments for each transaction will show the other account #. You'll find this feature handy if you want to split one payment between various sub-accounts. Note: don't use this feature to fix the situation when a Delivery is posted to the wrong account.

New Screen: Set Fuel Prices (added to the "Utilities (F7) / Posting Words (F2)" menu)

This screen allows you to easily manage your fuel prices. Highlight all the fuels that are priced the same and enter the current Retail Price and Cost in the appropriate boxes. Click the <Update Selected> button to save the prices.

Deleting Transaction History (available from DRM).

While there is technically no limit to how much history you can have, you will notice that the time it takes to display many of your reports does depend on how much history you have. If you want to see the reports sooner you should consider deleting some of your really old data. We strongly recommend keeping at least seven years worth of history. Do contact us for more information about this if you are interested in deleting some history.

Changes to Printing a Ticket

- You can now type just the number of gallons without having to enter a price.
- If you are Saving a Ticket, you can enter a special Note that is displayed on the Saved Tickets screen.
- If you price the ticket, the price is remembered when you post the delivery
- The Fuel Scheduling screen has been changed to show more information about printed tickets such as, # Gallons, Price, and When Printed.

Change to the Transaction History Screen

The column displaying the Batch # has been replaced with a column showing the description for the first transaction in the invoice. Now for example, in addition to seeing that the invoice was for a Fuel Delivery, you will also see it was for "#2 HTG RES". You will have to view the invoice details if you need to discover the batch #.

Changes to Custom Reports

- You can now sort Custom Reports simply by clicking on the column heading after the report is printed. However, if you need to sort by more than one field or by a field that is not in the report then continue to use the <Add to Sort> button.
- You will be now be prompted to save your changes when exiting the screen.
- Some new address fields have been added to the list of available fields.

Site_StreetName shows just the name of the street

Site_StreetNum shows just the street number

Site_City shows just the City

Site_State shows just the State or Province code

Site_Zip shows just the Zip or Postal Code

Changes to Finance Charges

- Use the Utilities Option: "**Posting / Fin Chrg Minimum**" to set a Minimum Finance Charge amount
A zero value indicates that the finance charge amount is strictly a percentage of the past due amount. For example \$20 past due would typically result in a 30 cent finance charge. Now if you prefer, you enter a value here to indicate a minimum finance charge amount.
- New calculation method available: Average Daily Balance
This is an alternative to finance charging the prior balance. Use the Utilities Option "**Posting / Fin Chrg Method**" to set your preferred method: "P" for Prior Balance is the default, "A" to use the Average Daily Balance approach

New Feature: Give Interest

If you like, you can now give interest to accounts with Prepay or Budget credit balances. You don't have to do anything if this does not appeal to you. Just like finance charging, the interest amount is figured out during month-end processing. The interest is calculated as Simple interest and uses the Average Daily Balance method. There are three new Utilities Options to help you in this area:

- **“Posting / Interest Rate per Month”**
The monthly percentage rate. Example 0.0025 equates to a 3% annual rate.
- **“Posting / Interest Given to Balance Categories (B, P)”**
A “B” value indicates that only Budget credit balances generate interest, “P” for prepay balances or “BP” for both.
- **“Posting / Do Interest Credits at Month End”**
A “Yes” value causes the “Process Interest Credits” box to be automatically checked in the Month End Processing screen

New Feature: Use Workstation Preferences to configure shared printing on your DOT MATRIX printers

If you always work on the same computer then you probably won't benefit from this change. However if you use different computers in the office and each one is set-up to print differently then this change may help. Instead of using the Personal Preferences options to indicate what printer to use, you can now use Workstation Preferences. This allows you to say that a particular workstation should always print tickets on a specific printer regardless of who is logged in. In essence Workstation preferences override Personal Preferences. Find the instructions for setting Workstation Preferences at the end of this document.

Instructions on providing Workstation Preferences for Shared Printing

Using ‘Notepad’ on each computer, edit the file “C:\Program Files\DRM Windows\drm.dat” and add the following lines to indicate the printer name for each printing purpose. If the printer is attached directly to this workstation enter “LPT1” for the printer name. If a shared printer will be used then use the convention “\\<Computer Name>\<Share Name>”

The drm.dat file might end up like this:

```
[User]
Server=SERVER
Id=DR
Co=2
DMP_TKT=\\Server\Oki3410
```

Or this:

```
[User]
Server=SERVER
Id=DR
Co=2
DMP_TKT=LPT!
```

- For Ticket Printing, add this line: DMP_TKT=<Printer Name>
- For Work Order Printing, add this line: DMP_WO=<Printer Name>
- For Label Printing, add this line: DMP_LBL=<Printer Name>
- For Postcard Printing, add this line: DMP_CRD=<Printer Name>
- For Envelope Printing, add this line: DMP_ENV=<Printer Name>
- For Budget Mailer Printing, add this line: DMP_BGT=<Printer Name>

Fixes and Small Changes

1. The latest EPA amendment has been added to your ticket messages. It now prints “Dyed Unmarked Heating Oil: Not for use in highway, nonroad, locomotive or marine engines.”
2. You can now indicate the type of each phone # stored for each account (example home, work, cell, fax)
3. When you're looking for a customer by account #, you can now also type a dash followed by the site # (example 1234-2)
4. You can no longer post to Inactive accounts. Make the account active again if you need to post.
5. The statement layout has been improved to only show relevant sections. For example it won't print a section for Prepay Activity if the customer isn't a prepay customer this year. A section only prints if there is either an opening balance or if there are transactions for the particular category.
6. If a customer's credit card has expired or will expire within the next month, you will be alerted on the Account Dashboard by seeing a red background color instead of the normal blue background.
7. The View Totals report only shows transactions that had activity for the period being printed.
8. When you are Posting Charges, the last charge you posted is remembered and picked automatically next time.
9. You can now specify whether an AutoPost transaction should be posted as “Regular”, “Budget”, “Prepay” or “Fuel Asst”
10. The Credit Card Batch report now includes the Card's Security code and the Billing address.
11. When you post a discount on the Credit screen the customer's default fuel is automatically picked.
12. When you're reviewing the suggested delivery list you can right-click on the highlighted customer to see a choice of relevant options.
13. When you're working on a Route you can now use the new button <Apply Criteria> to include other criteria in addition to the Degree Day and Zone you are used to.
14. If you're on a slower computer you should notice that the Meter Ticket and Billing screens open a little faster.
15. Custom reports now prints YTD Gallons with just a single decimal place
16. Use “F8” on the Daily Work Menu to display a Map to the account's site

17. Transaction History has been added to the Customer Information Pop-up Screen. Click on "More" Choose <F4> to show the history.
18. You can now delete any Taxes that were never actually used.
19. The Function Keys now work on the Route Building screens.
20. The Batch report now shows the GL number for each of the transaction totals
21. A very long Company Phone # now prints in its entirety on the bottom of an invoice.
22. The Sort buttons now work correctly on the Service Scheduling screens
23. You can now delete a scheduled fuel for a Service Only account
24. The date you last reset Degree Days is now displayed correctly on the Year End processing screen.
25. You can change the backup drive directly on the Backup screen.
26. When you view the Batch Details the invoices will be shown in the order by which they were entered.