

A new version of DRM Windows is now available and we think you're going to be excited about the latest changes! The new parts and liquid inventory modules really take the software to the next level and it's worth your while to learn what they can do for you.

You're now going to find it extremely easy to keep tabs on your oil contracts, regardless of whether your customers are pre-paying or budgeting. And the re-designed, pop-up customer and transaction viewer screens now make it possible to see and change information from virtually anywhere.

You'll also find the built-in credit card processing to be a huge time-saver. Finally, this is an ideal time to think about removing some of your history. Doing so will help your reports display faster and cut down the time it takes to perform a backup. We need to help you with this so do call us if you're interested.

The instructions for obtaining the update are printed on the last page. If you normally receive a CD update, you should receive it within the next two weeks. Now that this revision is completed, we're starting to work on the next one and, as always, welcome your suggestions.

Have a terrific summer!

*Dave and Keith*

### **New Feature – Contract Gallon Management**

There are 2 new fields on the Fuel Sch screen to help you monitor the fuel contracts you sell. Enter how many gallons were Purchased and the gallons Remaining field automatically fills in with the same amount. Continue to use the Prepay Price fields to show the Fixed or Cap Price. The amount remaining will automatically decrease as you sell fuel. As you post, you are always shown the amount remaining and alerted if the YTD total exceeds the contract. This feature will work for any of your customers regardless of whether they are coded as R, B, F or P.

These 2 new fields can be used in Custom Reports. They are named "UnitsPurch" and "UnitsRemain." For example, you can easily run a report to show how many contract gallons were purchased and how many are remaining.

### **New Feature – Credit Card Processing**

You can now process credit card payments directly from within DRM. You can post a payment to a customer's account and get an approval before or after a delivery. And credit card payments for your budget customers can be set-up to post automatically each month.

#### **Manual Payment**

Choose "Credit Card (F5)" from the "Posting" menu. The payment screen will fill in with any previously saved credit card information. Indicate the amount, press <Escape> and <Enter>. Within 2 seconds the transaction will be approved and posted to the account. You'll be informed of the reason (bad #, expired, etc) if the transaction is declined. In this event, simply make the correction and re-submit. You can make changes to the credit card information on this screen and they will be automatically saved (to be used next time). The approval code will be saved with the transaction in either the Comments or Ref # field.

#### **Automatic Monthly Budget Payments**

First you need to set-up an AutoPost payment for each budget customer who is paying by credit card. (You may already be doing this and printing a Batch Credit Card report).

Next go to the "Utilities / Options / Posting" screen, locate the option "Auto Post – Submit Credit Card Pymts to Bank" and check for yes. If this option isn't checked then the amount will still be credited to the customer's account but you will be responsible for posting the credit card transaction separately in order to get the money.

After you run the monthly AutoPost process, you need to review the AutoPost batch to make sure all payments were processed correctly. Under normal circumstances each credit card payment will be processed successfully and the next payment scheduled appropriately. However, there will be times when transactions are declined and you will need to understand the reason and act accordingly. If a credit card was declined (for example it expired) a zero dollar transaction will be saved. The comments section of this transaction will describe why the card was declined. Once you are aware of the reason, you can simply delete the transaction. An AutoPost payment is never rescheduled when the payment is declined. All you need to do is fix the problems and re-run the AutoPost process for the same date as earlier. Only the transactions that were not successful first time around will be attempted again.

### **Editing manual credit card transactions**

You're used to being able to edit or delete transactions before the batch is posted, but you cannot do this for credit card payments since the money has already been submitted to your merchant account. Instead, if you discover you've made a mistake, you will have to void the payment from the transaction history screen and also perform a void using the LinkPoint software (which you will have been trained to use.)

### **New Feature -- Easier to Manage Burner Cleanings**

You can now indicate the date of the last burner clean directly on the Site screen. This date will be automatically updated when you post a Burner Clean transaction. The Burner Clean date is also displayed on the dashboard below the dates for the Last Charge and Credit. The date is color-coded to help catch your eye.

- Green when cleaning happened within past 10 months
- Orange when cleaning happened between 10-12 months ago
- Red when cleaning happened between 1-2.5 years ago
- Blue (standard) when cleaning happened over 2.5 years ago

Use a date of "01-01-80" to indicate a cleaning has never happened and in this case nothing is displayed on the dashboard.

You can set-up more than one posting word as a Burner Clean. From the "Utilities/Post Words" screen, select the appropriate transaction and choose "Edit". Check the box next to "Is a Burner Cleaning". Next time you post this type of transaction, the Last Clean Date will be updated automatically.

The Last Clean Date is one of the available fields on the Custom Reports screen. It is called "DtBurnCln". You can use this as criteria to easily build a reminder mailing list.

### **New screen -- "Transaction Viewer"**

From a customer's Transaction History screen, choose "View (F2)" and the new Viewer screen will pop-up to show details of the selected invoice or payment, *as long as the batch has already been posted*. If the batch hasn't posted yet, the normal edit screen will appear, allowing you to make corrections.

This new viewer contains 3 tabs, showing either the list of the posted transactions, the note, or (in the case of a credit) the list of invoices paid. Use the <Left> or <Right> arrow keys to switch between the tabs or simply click on one.

You can make the following changes to the transaction (even if it occurred in a previous year):

- Change the type to R, B, F or P
- Indicate a Truck or Van, Driver or Tech, or Sales Rep
- Enter a Note
- Pick the invoices to pay in the case of a credit

By pressing your <Up> or <Down> arrow key, you can move to the previous or next transaction in the list.

You can use the Viewer in "Post Totals" by choosing "View Detail (F5)" when you are looking at the details of a batch. Use the <Up> and <Down> arrow keys to scroll through the details of all transactions in the batch. You'll find this to be an easy way to find problems or fix truck/driver information.

### **Easier to work with Quick Pick lists**

A Quick Pick list is an effective way to limit a report or group of statements to a specific list of customers and now this feature is even easier to use. A new button <Add QP> has been added to the Customer Dashboard screen to the right of where the Zone is displayed. Click this button and the current customer is added to your Quick Pick list. The customer will only be added once no matter how many times you click the button.

A new menu button “Quick Pick (F2)” has been added to the Reports screen. Choose it and the Quick Pick Wizard is displayed. Here you can see all the customers you have previously selected. You can delete ones you don’t want or add other accounts. The online help provides more details on this screen and using Quick Pick in general.

### **Changes to Posting and Printing Invoices**

1. You now choose whether you are posting a Fuel or Service invoice. A Service invoice always starts out as a “Regular” transaction and the list of Charge Posting Words (F3) is displayed. A Service invoice allows you indicate a Technician and Van, whereas a Fuel invoice allows you to indicate a Driver and Truck. You can indicate a Sales Rep for either.
2. The new Note field on the lower left of the screen makes it easier to enter a note. You’ll find this especially useful for recording information about a service job, but you can also enter comments for a delivery if you like. Any note you enter will be printed on the invoice, unless you remove the “Print on Invoice” check. You don’t need to remove this check if there is no note. Choose <Zoom> if you can’t see the whole note, and then <Shrink> to return to the normal mode.

When you’re typing in the Note field, <Enter> adds a new line to the note instead of jumping to the next field. Use <Tab> or <Shift><Tab> if you want to change fields.

### **New feature -- Consolidate Charge Taxes on an Invoice**

If a charge is taxable, you are used to seeing the corresponding tax amount show on the next line. We know this has been awkward when multiple taxable charges are posted on the same invoice, and we’ve made improvements in this area. You will continue to see the tax line right after you post. However, when you print the invoice or statement, similar taxes will all be totaled and each printed as one line at the end. You’ll find this especially useful when posting parts.

### **New Feature -- Laser Work Order**

This will print an 8.5 x 11 inch work order on plain white paper. From the “Utilities / Options” screen, edit the setting for “Printing – Use the Laser Work Order” and check the box. Now when you print a work order you will see it previewed on the screen first like all the other reports you print on the laser printer.

### **New feature -- Customer Information Screens have a new look**

Instead of taking up the whole screen, each screen pops up in front of the screen you are working on. Now you can now view and edit customer information from virtually anywhere in the software. If you are building a delivery list, you can jump directly to someone’s scheduling screen and make adjustments. When you are looking at a Custom Report you can choose the new option “View Info (F10)” to jump right into the customer screen for the record you have selected. Double-clicking on a line does the same thing.

### **New feature -- You can get to Reports again from the Daily Work screen**

“Reports” has been added back to the Daily Work menu. Our ears are still burning from when we took it away! However, many of you also like the “View Map” choice so that’s still there. Now you have a choice to display either “Reports” or “Add Note”. Since you can always add a note by choosing <New> above the list of notes, we figure most of you will prefer to leave the menu the way it is. But if you fell strongly about having “Add Note (F7)” on the menu then go to the “Utilities/Options” screen, select “My Preferences – Show Reports On Daily Work Menu” and remove the check for “Yes.”

## **BIG New feature -- Editing Information is easier and you can now also Copy and Paste**

When you are working on the customer information fields you can use these keys to move around and make changes.

Move to Next Field	<Tab> or <Down Arrow> or <Enter>
Move to Previous Field	<Shift><Tab> or <Up Arrow>
Move to End of Field	<End> positions the cursor to the right of the last character
Move to Start of Field	<Home> positions the cursor the left of the first character
Delete remainder of text	<Ctrl><End> deletes all text to the right of the cursor
Change from Overwrite mode to Insert	<Insert> changes the typing mode between overwrite and insert. Overwrite means you type over whatever is already there. Insert adds what you type to whatever is already there.
Undo Changes	<Ctrl><z> restores a field to its previous value
Highlighting Text	Holding down <Shift> press <Right-Arrow> for each character you want to highlight. You can also use your mouse.
Copy Text	<Ctrl><c> copies the highlighted text to the clipboard
Cut Text	<Ctrl><x> deletes the highlighted text after placing a copy to the clipboard
Paste Text	<Ctrl><v> pastes text from the clipboard

# **Big New feature – INVENTORY CONTROL**

## **Liquid Inventory**

After you set-up liquid inventory you will be able to manage your fuel inventory through performing purchase, transfer and adjustment transactions. Your on-hand quantities will be automatically lowered as you post product sales. You will also be able to run various truck and driver productivity reports. Even if you don't choose to actively manage inventory levels, you can still use the new driver/truck transaction reports.

From the main screen, choose "Inventory (F4)" and "Fuel (F2)" and then follow these steps to get started:

1. Add a record for each of the products you purchase.  
Choose "New (F1)" to display the New Record Screen. Enter a description for the new fuel item (example: "#2 HEATING", "KEROSENE", "DIESEL"). Then exit the screen by pressing <Escape> and <Enter>
2. Add a record for each location where fuel will be stored or sold from (Storage Tanks and Trucks)
  - a. First, open the fuel screen for one of the products you added in step 1. Do this by either double-clicking on the record or highlight it and choose "Edit (F2)"
  - b. To the right of the "Location" field, click on the button labeled "Change"
  - c. Choose "New Item (F4)"
  - d. Enter in up to 10 characters to identify this location ("Truck 21", "Tank 1") and then press <Escape> and <Enter>
  - e. Finish up by exiting out of the product screen without saving if prompted.
3. Assign your products to their storage locations. A multi-compartment truck might be set-up to store two different fuels whereas a tank generally stores just one product.
  - a. First, edit each of the products that you added in Step 1 and pick the Primary Location where it is stored. Choose a tank if you have your own storage or if not choose one of your trucks.
  - b. For each product that is stored in an additional location, choose "Xtra Loc (F4)", select the appropriate location and then save the new record.
  - c. When you're through you will have a record for each of the possible locations where your products could be stored.
4. Use inventory transactions to manage inventory levels. Select the product and location you want to work with and choose "Edit (F2)"
  - a. Use a "Purchase" action when you get a delivery from one of your vendors or load up a truck at the rack.
    - i. Enter the transaction date
    - ii. Enter how many gallons were purchased
    - iii. Enter the unit cost
    - iv. If you like, enter additional details such as a Bill of Lading # or Invoice # into the comments field
    - v. Pick the vendor who sold you this fuel
    - vi. <Escape> and <Enter> saves the Purchase transaction
    - vii. The QOH (Quantity on Hand) amount has been increased by this amount
  - b. Use a "Transfer" action to move some fuel from this location to another location (example storage tank to a truck)
    - i. The "Transfer From" location is automatically set to the current location.
    - ii. Click "Change" for the "Transfer To" location and pick the destination truck.
    - iii. Enter the date for the transfer
    - iv. Enter how many gallons were transferred.
    - v. If you like you can enter some additional details in the Comments field
    - vi. <Escape> and <Enter> saves the Transfer transaction
    - vii. The QOH for this location has been decreased while the QOH for the new location has been increased by the same amount.
  - c. Use an "Adjustment" action to reset the Quantity On Hand

- i. Generally you should not perform an adjustment if there is fuel pending
    - ii. Enter how many gallons are in the tank or truck
    - iii. Enter the average cost for this quantity.
    - iv. If you like you can enter additional details in the comments field
    - v. <Escape> and <Enter> saves the Transfer transaction
    - vi. The QOH for this location has been reset to this new quantity
  - d. View/Edit an inventory transaction
    - i. Select the transaction from the History list
    - ii. Choose <View/Edit> or double-click it to display the edit screen
  - e. Delete an inventory transaction
    - i. Select the transaction from the History list
    - ii. Choose <Delete>
    - iii. Your QOH is reduced by the corresponding amount
5. Assign each product you sell to its appropriate inventory product. For example, you might post “#2 Heating” in various ways such as Residential/Commercial/Exempt etc but they all draw from the same product you purchase.
- a. From the “Utilities / Posting Words” screen, edit each of your fuels
  - b. In the new Inventory section, click <Change> for Fuel #1
  - c. Pick the Inventory product that sales of this Fuel should draw from. The location doesn’t matter since you will pick the location when you post.
  - d. If this is a mixed blend then pick the 2<sup>nd</sup> inventory product for this fuel and then indicate its composition ratio (example 50%)
6. Set-up your driver list. If your drivers aren’t already set-up to use DRM, you’ll need to add a new user account for each one. If this is a concern, remember you can use security to limit what they can do in the software. You can also grant them no access to DRM at all.
- a. Choose “Utilities (F7) / Users (F1)” to display the list of users
  - b. Choose “New (F1) to add a new account or “Edit (F2)” to edit an existing user account
  - c. Check the “Is a Driver” box to indicate this is a driver.
  - d. Check the “Is a Tech” box to indicate this is a service technician.
  - e. <Escape> and <Enter> to save the changes.
7. Impact of Posting on Inventory
- a. *If you are already used to saving truck and driver information as you post, you will immediately notice how this has changed and it may appear that the information you have already entered is gone! Be assured the data is still there but we need to help you put it in the proper places so please call us.*
  - b. Select the correct Truck and Driver when you post the ticket. Since the last values are remembered, you’ll find it easier to group the tickets by truck. If you forget to enter the truck you can always change it later from the Print/Post Totals screen.
  - c. The fuel you post isn’t automatically deducted from the inventory for the truck you picked. Instead it is displayed as “Pending”. It is only when you Post Totals that the actual inventory quantities are reduced.
  - d. If you don’t select a truck when you post then the inventory for the fuel’s primary location is reduced.
8. Miscellaneous Inventory features
- a. From the Maintenance screen, click <Sales>Returns> to see the most recent 20 sales for this product. Double-click a record to view the invoice.
  - b. Click <Sold As> to see all the fuels that have been assigned to this product.
    - i. Choose <View Fuel> to display the Fuel Maintenance Screen
    - ii. Choose <Set Prices> to easily set the Selling Price
9. New Report – Transactions By Truck/Driver/Rep

- a. Choose the date range and products for the report
- b. Decide if you want to group it by truck or driver
- c. Choose which report options you want:
  - i. "Show line item details" displays every delivery made by a truck/driver
  - ii. "Show daily totals" displays daily totals (gallons and deliveries) for each truck/driver
  - iii. "Show grand totals" displays grand totals for the report date for each truck/driver

10. New Report – "Inventory Transactions"

- a. Choose the date range, locations and types of transaction to show

## **Parts Inventory**

After you set-up your parts inventory you will be able to manage your stock levels and pick from the parts list as you post. If you like, you can manage various locations for your parts (Warehouse, Vans) and transfer items back and forth. However, we suggest you start out with just one location for each part until you become comfortable with all the features of the parts system. Since you may stock hundreds of various items, it's important to be able to easily and quickly find the correct one as you post. You'll see how assigning additional information to your parts like categories, vendors and manufactures greatly helps to locate a part. Choose "Inventory (F4)" and then "Parts (F1)" and then follow these steps to get started.

1. Set-up a new part. You'll probably find it easier to set-up your parts list from the inventory screen, but you can also add new parts as you post.
  - a. Choose "New (F1)"
  - b. Provide a description for the part. Enter up to 20 characters. The description prints on the invoice. A good description that follows a convention will make it much easier to locate the item.
  - c. Provide an SKU # for the part. Enter up to 30 characters. The SKU provides an alternative way to locate a part.
  - d. Set the current sales price
  - e. Set your normal margin. 1.33 indicates a 33% markup. To set your default margin, choose "Inventory – Default Margin for New Parts" and enter the appropriate amount.
  - f. Set your Reorder Level. When the QOH drops to this level the item will show on the Reorder report.
  - g. Set you Reorder Quantity.
  - h. Enter a Bin # if you have one.
  - i. Enter up to 80 characters of comments in the Notes field.
  - j. Pick the primary location for this part (example: Warehouse)
  - k. Pick the Primary Vendor for this part. If you ever purchase the item from other vendors, they will be listed under "Other Vendors"
  - l. Pick a Category for this part. Setting up categories for your parts will help you filter the parts list and quickly locate the correct item. Some good examples of categories are: Black Iron Fittings, Nozzles, Filters, Copper Fittings, etc.
  - m. Pick a Manufacturer for this part if you like. You can then use this as another way to help locate the correct item.
2. The Parts Transactions (Purchase, Adjustment and Transfer) work the same way as in Liquid Inventory.
3. The Reorder Report will list all items where the on-hand quantity has dropped to the reorder level. You can easily pick the ones you want to reorder and print a report. Once you choose "Reorder Parts (F5)", the part will show that it has been ordered.
4. Choose "Vendors (F3)" to manage your vendor list
  - a. You can enter all sorts of contact information in the Vendor record as well as seeing all the other parts they supply.

## Installing the update from our website

1. Perform a backup. It can either be an internal backup or a server backup. You don't have to perform a CD backup so make sure the "Copy To Media" option is un-checked.
2. Make sure everyone has exited the program.
3. Go to the **Revisions** screen on our website and click the link to download the updates (remember to hold your shift key down while clicking).
  - a. Login name is **drmuser** (Call us for the current password).
  - b. After you click the Login button you will see a list of files.
  - c. If you see a folder named **drmuser** then double-click on it, otherwise you are already in the right place.
4. Perform the Server Update. You only need to perform this step ONCE and it should run a bit faster if you can do this on the actual server although this is not necessary.
  - d. Double-click the file **drm\_server\_585.exe** & choose to run it.
  - e. After a moment the **DRM Database Update Wizard** will start and the following message will be displayed: *"This will update all these companies to the current version."*
  - f. Click <Proceed>
  - g. **NOTE: PLEASE BE PATIENT EVEN IF THE COMPUTER APPEARS TO BE HUNG. IN THE UNLIKELY EVENT THAT THIS DOESN'T FINISH WITHIN 5 MINUTES THEN PLEASE CALL US BEFORE REBOOTING.**
5. Perform the Workstation Update. You need to perform this step on EVERY computer (*including the Server*) where DRM is used
  - h. Exit out of DRM Windows if it is running.
  - i. Double-click the file **drm\_workstation\_151.exe** and choose to run it.
  - j. The necessary files will be automatically copied to your computer and you do not need to do anything.
  - k. A message will be displayed to indicate the update was successful.
  - l. Log back in to DRM Windows
6. Send us an email to let us know you've upgraded!
  - m. We like to keep track of where everyone's at
  - n. Tell us a joke while you're at it ...