Summary of changes to the software from revisions 153 to 160

New feature -- Print receipts for credit received on account.

The receipts are designed to print on thermal receipt paper and resemble a typical credit-card style receipt. We recommend the **Dymo LabelWriter 400** (Dell Part # A0510778.) It is a compact printer and you can easily locate it on your desk beside your monitor. You will also need the **Dymo 30270 White Continuous Paper** (Dell Part # A0510778.) which comes in 300' rolls. Since it's a thermal printer, you'll never need to replace toner or ribbons.

After you've setup the printer you'll be able to let DRM Windows know that you want to use it to print receipts. Visit the "Utilities / Options" screen and edit the option "My Preferences / Printer for Receipts." Click "Pick Printer" to see a list of all your printers and choose the appropriate one.

You can use this new feature to print a receipt after you post any credit by either typing "P" or clicking "Print" when you are prompted to save the credit. To print a receipt after it has been posted, visit the "View Trans" screen, select the appropriate credit, and choose "Print (F5)" from the menu.

Enhancements to Credit Card Processing

- *Pre-authorize the payment ahead of time*
  Pre-authorizing puts a hold on the customer's credit card until you complete the sale at a later time. Be aware that authorizations don't last forever and will expire within a few days depending on the credit card used. Perform a pre-authorization by choosing "Pre-authorize" instead of "Normal Sale."

  Once the request has been approved and you have closed the credit card screen, you will see a message "Credit Card Authorization has been approved" displayed on the customer's Posting menu. Next time you open the credit card screen for this customer, the "Post Authorize" option is selected. Keep this choice if you want to complete the sale. You can adjust the amount to charge if it is lower than the authorized amount. Alternatively, choose "Del Authorize" if you want to cancel the authorized transaction.

- *Voiding a Credit Card transaction*
  Go to the customer's transaction history screen, "View Tran / F5" and highlight the appropriate transaction by clicking it. Choose "Void / F4". You will be prompted to confirm your action. If you agree, the credit will be immediately removed from the customer's balance and then the credit card screen will open, prompting you to either choose "Void" or "Return." *Note: this is the step that returns the money to the customer's card so it important not to close out of the screen*. Choose "Void" if you are canceling the transaction on the same day otherwise choose "Return."

- *Set the default Credit Card action.*
  To make it easier for you, you can choose to have either "Normal Sale" or "Pre Authorize" selected automatically every time you perform a new credit card transaction. If you don't set a preference, you will have to pick the one you want every time. To set your preference, visit the "Utilities / Options" screen and edit the option "Posting / Credit Card – Default to Sale (S) or Auth (A)." Save an "S" if you would like the "Normal Sale" choice selected by default. Save an "A" if you would like the "Pre-Authorize" choice selected by default. If you leave it blank, neither choice will be selected.

- *Receipt Printing*
  You can choose to print a receipt immediately after the transaction is approved. Click "Print Receipt" instead of "Enter when Done". See the receipt printing section above for information on setting-up your receipt printer.

Enhancements to Posting

- If you need to return to a prior field on the line you are working on, press the Up Arrow key. Alternatively, the Shift-Tab key combination can still be used.
- If you need to return to a prior line, first return to the date field on the current line and then use Up Arrow to work your way up the grid to the appropriate line.
- If you need to change the date by a day or two, instead of keying in the entire date, simply press either the Plus (+) or Minus (-) key to automatically advance to the next or previous day.
- If you enter Truck and Driver information as you post and don't like clicking on the list to make a choice, you can now type the information in instead. You'll also find that pressing the Down Arrow will allow you to scroll through the list.

Enhancements to Fuel Usage Chart

- Two years of delivery information is displayed and you can compare monthly totals at a glance. The blue shading is for the most recent period and the green shading is for the previous period. You can change the periods by choosing a different Ending Date.
- Notice the summary section displayed in the lower right corner; you can compare the total number of gallons delivered and the average drop for each of the 2 years.
- If you click on the "Show Details" button located at the bottom of the screen, a list will be displayed showing details for each delivery made during the two year period you selected. Double-click on a line to see the complete invoice for that delivery.
- If you move your mouse over one of the bars in the chart, you will see a summary for the number of gallons and deliveries made for that month. If you click on a bar, the invoice window will pop-up if there only one delivery for that month, otherwise the details list mentioned above will be displayed.

Miscellaneous Changes

1. You can now print a Work Order on your laser printer. This work order has been designed to print on a standard blank 8½ x 11 sheet of paper. To print this laser work order instead of the default multi-part form on the dot matrix printer, you need to navigate to the "Utilities / Options" screen, edit the setting for "Printing / Use the Laser Work Order" and check for "yes."

   If you need a multi-part work order, Wehof can supply special "Digital" laser paper that is coated like NCR paper. Print a second copy of the work order, put one behind the other and write up the work done.
2. If you are finding that the new Customer Information screens are too small, you can choose to increase the font size. From the "Utilities / Options" screen, edit the setting for "My Preferences / Use Large Font for Cust Info Screens" and check for "Yes."
3. A new "Budget Information" section now prints on budget statements and displays details about the customer's budget plan and year-to-date payments received.
4. The layout of the Transaction History report has been improved. It now prints your company name and address. The billing address has been aligned to show in a standard #9 envelope with window.
5. You can now use Transaction Finder to search for Invoice Totals. You'll find this especially useful if you receive a payment and are not sure what account/invoice it is for.
6. The Dot Matrix Label screen has been improved. In the "Type an Address" screen, you can choose to load your own company address. You can also indicate how many labels to print.
7. The Last Charge date that is displayed on the customer dashboard screen has been changed slightly to better help you understand the reason for the last charge. A "D" is displayed to the right of the date if it was a Delivery. As

before, an “F” is displayed to indicate a Finance Charge. If no code is displayed then the last charge was neither a delivery nor finance charge.

8. The information displayed on the screen’s title bar has been reorganized. The Company Name is shown on the left-hand side. The Degree Day information is shown in the middle. The name of the current screen displays to the right. You’ll find this useful if you’re running multiple companies and need to change from one to another… the company name shows on the Windows task bar.
9. You are used to having a Service Invoice start-off as a Regular transaction even for a budget/prepay/fuel assistance customer. If instead, you prefer that it start-off like a Fuel Invoice and defaults to the customer’s transaction type code (RBFP), then edit the new option “Posting / Start Service Invoices as Regular Trans” and remove the check.
10. You can set the transaction date on the Move Balance screen. It defaults to your posting date. You can thus change the transaction so that it appears to have happened in a previous month and doesn’t appear on the current statement.
11. A new field “DtLastDelAny” has been added to the Custom Reports screen. It shows the date of the most recent fuel delivery, whether it was scheduled or not. The original “DtLastDel” field is still in the list and it shows the most recent delivery for the 1st scheduled fuel. If you have customers with multiple scheduled fuels or receiving unscheduled fuel, you’ll find this new field useful.
12. A Finance Charge message now prints on the bottom of an invoice just like the one on a statement. The message will not print if the customer does not normally get finance charged. It also will not print if you set the monthly rate as zero.
13. When you are reviewing a delivery route, highlight a customer and choose “Cust Info” to display the Fuel Scheduling Screen. You can make changes to this information if you like and then return to where you left off in the delivery list.
14. To better help you reconcile your bank deposit slips, the Credit section on the Post Totals report now prints the total Deposit amount. Edit each of your credit posting words and check “Include in Deposit” to indicate that it’s one of your bank deposit items. Generally checks and cash are the only items you would “Include in Deposit”.
15. The address block on the laser envelope has been moved about an inch to the right. Refer to the help system if you’re interested in learning how to print envelopes on your laser printer directly from the customer dashboard.
16. The credit card transaction report available from the “Print/Post Totals” screen now prints the transaction date.
17. A note will only print on an invoice if there is something typed in. In other words, an empty note will not print even if “Print Note on Invoice” is checked.
18. You can print a picture of the “View Trans” screen by pressing the F12 key.
19. You can print a picture of the “Inventory” screen by pressing the F12 key.
20. You can print a picture of the “Note Detail” screen by pressing the F12 key.
21. The problem with saving information for credit cards that expire in February has been fixed.
22. When you save a custom report, the column widths you set are remembered next time you run the report.
23. When you print a saved work order, the Printed indicator is now saved correctly.
24. On the “Print-Post Totals”screen, the heading, “Post On” now includes, “Last Year”
25. If you are in a customer’s Scheduled Service screen and only make a change to the “Work Order Printed” value, you will now be prompted to save the change when you exit the screen.
26. Account balances are aged and displayed immediately after performing a “Reset Payment” from the “View Totals” screen.
27. The Kickout Report that prints for a particular batch now only lists customers scheduled for automatic delivery.
28. If you need to change a customer’s Fuel Assistance available amount you can now type in a decimal.