

Summary of changes to the software from revisions 170 to 180

Installing an update has never been easier! No more confusion over “server” and “workstation”... There is now only one program to run and it should start automatically after you insert the CD. Simply follow the instructions displayed on the screen.

Coming Soon...

As usual, before describing all the neat changes you’re getting with this revision, we like to tease you with a preview of the big changes we’re working on. Please let us know if there’s something in particular that would “make your day!”

- **Take your website to the next level** (if you don’t already have a website, we’d like to help...)
 - Send email statements instead of paper statements to customers who want to “go green.”
 - Send an email to a customer after they have a delivery.
 - Let a customer log into *their* account on your website, where they can review their recent transaction history, see balances and make a credit card payment right there.
 - Let your staff use your website to see customer information. Decide what information can be seen by whom. This way you don’t need to leave the computer on in the office or bring backups home.
 - Send emails to advertise special deals (example: coupons for call customers; service contract info etc.)

Of course your valuable customer information will be completely “safe” and only accessible by the appropriate people. You won’t necessarily have to use all these benefits and for example may instead only want to start off by sending emails. We’re very excited about bringing DRM into the internet age like this and believe it has the potential to help you cut costs and also improve your cash flow. Stay tuned for more information!

- **Improved Budget Management**
Better tracking of budget activity. Easily know when someone is behind. Simpler mid-season resetting of budgets.

New feature –Statement Notes.

You can now print a note on a statement. The note will print in a box below the activity sections. It’s like printing a postcard on a statement, except a note can be as long as you like. Similar to how you can manage a list of ticket and statement memos, you can keep up to 99 different notes. You’ll discover notes to be a great way to advertise special programs, or print reminders for past due balances. You can also change the note’s font to make it better stand out.

On the statement wizard, you can choose a note from a list of saved notes. If you want to see the entire note, click the “View Note” button. If you want to add a new note, simply click “New Note”. You can also manage notes from the Utilities/Options screen. Set the Category to “Statement Note” and you will see all the notes.

New feature – Print Credit Card Payment section on Statement.

If you accept credit cards, you may find it useful to show this payment option on your statements. It prints on the payment slip above your company name.

We Accept:     Card Number: _____

Name On Card: _____ Zip Code: _____ CVM Code: _____

This message will not print on your statements until you indicate that you want it to. Open the Utilities/Options screen, edit the Printing Option “Statement – Credit Card Payment Section # to Show” and enter one of the following values.

- “0” - Don’t print the credit card payment section.
- “1” - We accept Visa, MasterCard & Discover.
- “2” - We accept Visa, MasterCard, Discover & American Express.

Enhancement – Printing Budget Information on Statements

The budget information section prints on each budget customer’s statement and shows the budget period, normal monthly payment and total payments received year-to-date. You now have new choices for displaying this section. Open the Utilities/Options screen and edit the following Printing Options to indicate your preferences:

- Statement - Show Budget Section: if you choose “No”, the entire section will not print
- Statement – Show Budget Payments Received Line: if you choose “No”, the last line will not print

New feature – Laser Postcards.

You can now print postcards on your laser printer. The Avery 8387 measures 5½” x 4¼” and you get 4 to a sheet with no waste. The Avery 5389 measures 4”x 6” but you only get 2 cards to a sheet. Be sure to correctly choose between the Laser and Ink Jet printer brands as they are not interchangeable.

You will use your word processing software to print the message side of the postcard. The Avery (www.avery.com) and Microsoft Office (office.microsoft.com) websites have many free sample templates available which really make it easy to design your own attractive looking postcard. Alternatively you can use your local printer to print the message.

You’ll use DRM to print the address side of the postcard and this works the same way as printing laser labels. If you want, DRM will print your company information in the return address section. You choose whether to print the customer’s Billing or Site address.

New feature - Fuel Contract Dates.

You can now assign an effective date range for a fuel contract. The date range will be used for both the fixed/capped price and the gallons purchased. By using the dates, you can pre-enter contract information but it won’t take effect until the correct time.

If you post a delivery outside the contract period you will be alerted to the fact that there is an “Inactive Contract” and the current price will be used instead of the contract price. Additionally, the Contract Gallons remaining will not be changed.

If you want to use this feature, you need to open the customer’s Fuel Scheduling screen and check the box for “Use Dates” in the fuel contract section. This will fill in the starting and ending dates with your default contract dates, which you can then adjust if necessary. To setup your default/typical contract period, edit the new Posting options (Utilities/Options screen) for “Fuel Contracts – Default Starting Date” and “Fuel Contracts – Default Ending Date”. These are the dates that fill in automatically when you check the “Use Dates” box.

If you choose not to use the contract dates then any Contract Price and Gallons Remaining information will always be in effect.

3 new fields have been added to your custom reports list to help you utilize this new feature:

- FuelCtr is either “Y” to indicate that the fuel contract dates are being used or “N” if they’re not.
- FuelCtrBeg is the date on which the fuel contract begins.
- FuelCtrEnd is the date on which the fuel contract ends.

Enhancement –Last 6 Deliveries Information

Information about the last 6 deliveries (date/gallons/factor) normally prints on your ticket. The date now includes the year. This information is automatically updated as you post but if you like you can now edit these fields. Open the customer’s scheduled fuel screen. Click on the choice for “Last 6” in the delivery history section to show the 6 editable fields. The most recent delivery is on the bottom. Click “Reset” to fill in the information automatically based on the last 6 deliveries.

Enhancement –Year End Processing: Reset Fuel Contracts

Open the Utilities/Year End screen and choose the option for “Reset Contracts/Prices”. Indicate which items you want to reset and then pick the accounts you want to update. You must pick at least one item to update.

- Reset Contract Dates: Removes any contract dates that have been entered
- Reset Contract Gallons: Moves the number in the “Gallons Purchased” field to “Gallons Purchased Last Year” and then zeros out both “Gallons Purchased” and “Gallons Remaining”
- Reset Prices: Changes a Fixed or Capped Price to “R – 0” indicating that the daily price be used.
- Pick the accounts to update. Usually you would reset all your accounts but if you have a reason for only resetting certain ones, then you can use a quick pick list for this purpose.

Security Enhancement – Hiding Credit Card Information

In accordance with industry guidelines, customer’s credit card information that you save will no longer be readily displayed. Only the last 4 digits of a credit card number is displayed. The security code is also hidden. As you enter this information, the numbers you type will be correctly displayed so that you can see what you entered. However once the record is saved, the numbers will be hidden. If you need to correct a number, you will need to re-enter the entire number.

New feature – Change Posting Word Descriptions

You can now make changes to your Posting Word descriptions (the information that prints on the ticket and invoice). Additionally, you can now type in up to 20 characters instead of being limited to 15. Perhaps you'd prefer to print "#2 HEATING OIL" instead of "#2 HTG ^", etc.

However, make changes with caution! Don't change the meaning of a posting word. For example, say you have "KEROSENE" as a posting word but you no longer sell this product. Now you want to start selling Propane. Don't change "KEROSENE" to "PROPANE" as your old kerosene sales history will print as propane. Instead, simply add a new posting word for propane and indicate that kerosene is not active.

Enhancement – Laser Work Orders

- A reference number now prints at the top of the work order. The number will start at 1001 and increase by 1 each time. Please call us if you prefer a different number.
- You can indicate how many copies to print of each work order. If you do typically print multiple copies, we recommend using digital carbonless paper, stocked by the friendly folks at Wehof. Use the option for "Printing / Laser Work Order – Number of Copies to Print" to indicate how many copies you normally print and avoid having to change it each time.
- You can now print blank work laser orders.
- You can choose between 2 work order templates and 1 inspection report. Use the option for "Printing / Laser Work Order – Default Report" to indicate which number you normally print and avoid having to change it each time.

New feature – Custom Aging Categories

As you know DRM breaks down Regular balances into 30, 60, 90 day categories. This feature will remain but in addition you can now setup new categories that may be more appropriate for your business. For example, say you give a discount if paid within 10 days, it would be useful to track balances broken down like this, or perhaps you send an account to collections once they go 45 days past due. The new custom balances will be displayed on the dashboard in the same section where the regular aged balances were displayed. Unless you change the settings, the aged balances will show the same 30, 60, 90 breakdown you are used to.

Change the categories from the "Utilities Options" screen. Choose the "Aging" category and edit the choices for the 3 "Custom Aging..." settings. Be aware that account balances will be broken down according to the new categories until you perform an Aging (either daily or month-end).

The two standard Aging reports have not changed and will continue to show the 30, 60, 90 day breakdown. You can use a custom report if you want to report based on the custom balances. The 4 new fields BalAge0, BalAge1, BalAge2, BalAge3 and BalAge4 have been added for this purpose.

Enhancement – Google Maps

Google maps is now the default mapping screen. We think you'll find that it is both faster and has more features than Mapquest. However, you can revert back to using Mapquest if you prefer by entering a value of "M" for the option "System / Map System to Use".

One of the neat features with a Google map is it will show you directions from your location as long as you have values entered in the Options screens for "System / Map Starting Location. Usually you set this to be your office and it displays on the map as point "A" with a line to the destination point "B". However, say your driver is in a different part of town and wants directions from the truck. First right-click on "A" and choose "Remove this destination". Then right-click on the map where the truck is and choose "Directions from here." A new line will be drawn to the customer's house and written directions will be listed along the left-hand side.

Enhancement – Assign a Default Note Category

When you add a new note you are used to having to first select a category for the note before you can start typing the note. Now you can assign a default category that is automatically chosen. This will allow you to start typing the note immediately and you will only have to choose a category if it is different.

Assign your company's default note from the "Utilities / Notes" screen. Edit the record for the appropriate category and check the box next to "Default." Other users will need to log-in again in order to pick up this change.

Miscellaneous Changes

1. The amount of Fuel Assistance (F/A) Remaining is now displayed in the balances section on the Meter Ticket and Invoice screens for F/A accounts. The amount is color-coded to catch your eye: Green when the priced ticket is covered by the F/A available, and Red when the amount available is insufficient.
2. “Delivery Totals by Month” is a new report that will show you fuel totals summarized by month. It has been designed to show a 12-month period, and for each month display the total # of deliveries, gallons and \$ amount for each of your products.
3. The Note screen now displays account information such as Name/Address/Phone# etc. You’ll find this useful if you choose to print a copy.
4. You can now choose to print a custom report for just the list of accounts that were previously added to your **Quick Pick** list. On the “Criteria (F5)” screen, click the new button “Use Quick Pick Accounts.” You will see this line added to your criteria list: “The account is included in the QuickPick list”
5. You can now type in up to 25 characters for a comment when you are posting.
6. The 2-year Fuel Usage chart now shows a total dollar amount for each year.
7. Within the scheduled fuel section on a customer’s dashboard, the date of the last delivery is now displayed. Previously you would see the Degree Day number if the customer’s schedule was based on degree days.
8. As you type in customer information and reach the end of the field, the cursor will automatically advance to the next field. It may take a day or two to get used to this new behavior.
9. You will be prevented from printing a ticket or work order if the customer has been made inactive. This is now consistent with how posting behaves.
10. The Saved Ticket report has been changed to be more consistent with the standard Delivery Scheduling report.
11. A new option, “Do Finance Charging at Month End” has been added to your Posting preferences. If you set it to “No” the Finance Charge option will not be automatically checked-off when you open the Month-end processing screen.
12. Double-clicking on a custom report’s column heading will automatically change the column’s width to be just wide enough to display the longest value.
13. A new summary section has been added to the Credit Card report that is printed from the Post Total screen. The credit card transactions will be summarized by credit card type. You should find this useful for reconciling with your merchant account.
14. The reports “Statement – Dot Matrix” and “Statement – Laser” have been removed from the reports list. If you do need either of these reports, please call us and you’ll have it back within 30 seconds!
15. Posting a delivery as Fuel Assistance (F/A) will not lower how many Contract Gallons are remaining if the customer has purchased a fuel contract.
16. From the customer dashboard, a single-click (instead of a double-click) on the scheduled fuel list will open the Fuel Scheduling screen.
17. The issue with adding floaters to an empty batch has been fixed.
18. You can now enter up to 6 characters in the customer’s Credit Card Zip Code/Postal Code field. Previously you were limited to 5 characters.
19. The account’s first bill-to phone # now prints on the Note Detail report.
20. You can now choose between printing a customer’s billing or site address on a laser label.

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