

New feature – Quick Post

Quick Post is a new approach for quickly entering a batch of delivery tickets. Instead of having to open each customer’s account in order to post a delivery, you can now enter a group of tickets into one screen, sort of like a spreadsheet. It is designed to allow you to enter all the slips for a particular driver’s route and quickly see if the total gallons delivered matches the gallons entered. There are some trade-offs for posting this way. For example, you won’t be able to adjust scheduling factors or enter additional delivery charges.

To get started, select “Quick Post (F7)” from the Post Tran menu.

First you enter details about the route

The screenshot shows a window titled "Quick Post" with a "Quit (Esc)" button in the top left. Below the title bar are several input fields: "Post Date:" with a dropdown menu showing "11/23/2011", "Driver:" with a dropdown menu showing "SM", "Truck:" with a dropdown menu showing "TRUCK 1", "Fuel Category:" with a dropdown menu showing "Heating Oil", "Price:" with a text box containing "3.499", and "Gallons:" with a text box containing "1357.8". A "Create" button is located to the right of these fields.

- The Post Date should be the Delivery date. All slips entered will use this date.
- Select the Driver and Truck if desired.
- Select the appropriate Fuel Category for what was delivered (for example, Heating Oil or Kerosene)
- Enter the Retail Price. This price will be used if the ticket was not priced.
- Enter the total Gallons delivered for the route. This number will drop as you post each slip and it should reflect zero after the last one is entered. Not zero indicates a discrepancy between the shift report and the gallons entered.
- Click the “Create” button and you can now start keying in the slips.

Enter one ticket at a time

The screenshot shows a form for entering a ticket. Fields include: "Acct#:" with "35", "Ref:" with "78341", "Full?" with a checked "Y" checkbox, "Gallons:" with "179.8", "Price:" with "3.499", and "Total:" with "629.12". There is a "View Acct" button on the left and a "Give Disc?" checkbox with "N" on the right. Below these fields are two rows of data: the first row shows "35-1", "BARBARA ALLEN", and "1. #2 OIL RES"; the second row shows "No Ticket" (in red), "23 JEANETTE DR", and ".12 7-DAY" (in green).

- Type in the account # and press <Enter>. You do not need to enter the “-1” if the account ends like that, otherwise you must enter the complete #. For example “1234” is the same as entering “1234-1”, but you must key in “5678-2”. Basic account details are filled in if the account # is matched.
- The message “No Ticket” will be displayed in red if there is no ticket printed for this fuel. You can still process the slip in this case.
- Enter “N” if the tank was not full. You will not be prompted to enter how full the tank was, like you are in the traditional posting screen. Instead the customer’s tank ITA will be set to how many gallons were delivered. With this in mind, this approach may not be appropriate for Automatic customers on a k-factor schedule when the tank is not filled.
- If the customer has been setup with a discount code, it will be highlighted with a green background and you will be able to apply the discount after you enter the total price, by typing “Y” in the “Give Disc?” field.
- After you complete the final field (this will be the Discount field if the customer is eligible for a discount, otherwise it will be Total amount), press <enter> and the delivery record will be added to the list.

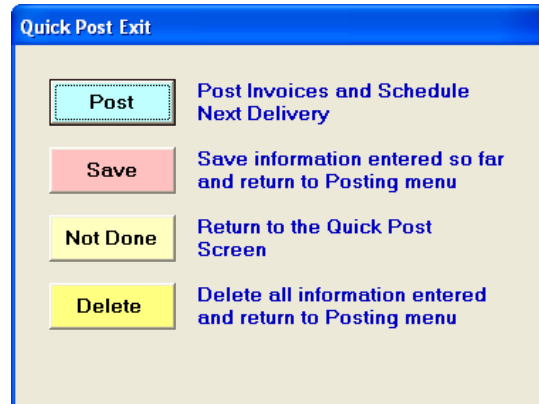
Acct #	Site Name	Ref#	Gallons	Price	Total	Fill	Disc	Fuel Desc	Address
33-1	COOMBES, ROBERT	7831	189.0	3.499	661.31	Y	N	1. #2 OIL RES	450 MAIN ST
23-1	GARVEY, SKIP	7832	100.0	3.499	349.90	N	N	1. #2 OIL RES	500 SHORE RD
38-1	LAURA TUCKER, RICI	7835	209.7	3.499	733.74	Y	Y	1. #2 OIL RES	31 NONANTUM LN
39-1	WEINKOPF, GUENTHI	7840	150.0	3.499	524.85	Y	N	1. #2 OIL RES	38 WILKEY WAY
Total # Records: 4			648.7		2,269.80				

- The information doesn't actually get posted to the account until you have entered all the tickets for the route.
- To delete a ticket from the list, select it with a <left-click> and then <right-click> to see the pop-up menu prompt "Delete Selected Invoice."

Press <Escape> or click the "Quit (Esc)" button when you have finished entering tickets for this route and select one of the four actions.

"Save" returns you to Daily Work and preserves everything you entered until the next time you return to the QuickPost screen.

"Post" creates the invoices and schedules the next delivery, using the account's current scheduling factor.



New feature – Thermal Label Printing on Dymo Printers

The Dymo Label Writer is a compact printer that easily fits on most work surfaces next to or under your monitor. It is a thermal printer so you will never need to replace ink, toner or ribbons. We have recommended this printer for several years as an affordable solution for printing credit card or payment receipts. Now you can also start to use this printer to do what it is primarily designed for -- Print Labels!



Our old solution for printing laser labels still works great when you need to print dozens or hundreds of labels for a group of accounts, but was never really suited for printing individual labels. Once everything has been set-up, simply choose "Prt Label (F9)" from the Daily Work menu and a label for the current customer quickly prints.

There are a variety of label sizes available for the printer. Either of these two should cover most cases:

- 30252 1 1/8 by 3 1/2 inches is ideal for printing a single address
- 30256 2 5/16 by 4 inches is appropriate for printing both a return and a destination address

We support the following Dymo printers:

- Label Writer 400
- Label Writer 400 Turbo
- Label Writer 450
- Label Writer 450 Turbo

Once you have set-up the printer by following the instructions that came with it, you are ready to configure DRM. Open the "Utilities/Options" screen, choose the "My Preferences" category and edit each of these settings:

- | | |
|---|---|
| • Thermal Label - Printer to Use | Pick the Dymo printer from the list |
| • Thermal Label - Style to Print | Select the label size from the list (probably 30252) |
| • Thermal Label - Is Being Used | Check "Yes" to use the Dymo instead of your dot-matrix printer |
| • Print Envelope instead of Label in Daily Work | "Yes" means the menu item "F9" prints a label
"No" means the menu item "F9" prints an envelope |

In addition to using the Dymo for printing individual labels, you can use it to print a group of labels for a mailing campaign. From the "Reports" screen, choose "Labels – Dot Matrix or Thermal Printer." Be sure that the Dymo printer is selected and then use the wizard to indicate the customers to include.

Miscellaneous Changes

1. We have modified LinkPoint to address the new requirements from First Data. You can now process Voids and Returns once again through DRM.
2. New Laser Work Order Template “Style #4”. This is similar to Style #1 except that the signature section has been removed to allocate more space for documenting the work done.
3. The issue with printing saved work orders has been resolved.
4. You will now be alerted about any past due AutoPost transactions upon exiting the system.
5. You can now use filters for Truck, Driver and Rep on the Fuel Deliveries report.
6. Easy way to report on accounts with a particular Account Status. Open the Account Status screen from the “Utilities/More” menu and select the desired status record. The “Count” field shows how many accounts currently have this status. Choose “Add Quick Pick (F6)” from the menu and you will be prompted to add these accounts to your Quick Pick list. You can use this Quick Pick list as a filter with most other canned reports or also from the Custom Report screen. If you want to work directly with each account, simply open the “Get Cust” screen and check the “Use Quick Pick” box.