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This document describes the various enhancements and modifications to DRM Windows that occurred between versions 6.2.216 and 7.6.240.

Enhancements to Customer Lookup

There have been two types of change to this screen that add more flexibility and options to how you search for and locate the correct account.

"Starts With" vs "Contains".

Select the column you wish to search on (account #, billing name, address etc.). Start typing in the Search box and the Finder automatically moves to the record that most closely matches what you have entered. How it searches depends on the active mode. You are already familiar with the "Starts With" mode which is where the field must start with your selection. For example, in this mode you typically search on the customer's Last Name. To also search on the First Name, switch the mode to "Contains". Type "Scott" for example and the first customer whose either first name or last name is "Scott" will be selected. If this is not the correct record click the "Next" button to jump to the next "Scott".

You can use this technique to include the house number in your search. A "Starts With" search will look for the house number. Example, "123" will jump to the first record with house number 123. "123 Main" will look for the matching street name also. Switch mode to "Contains" if you prefer to just search on street name, such as "West Main". Experiment with this new approach but know that there is a way to revert to the old approach of just searching on street names that start with your criteria. If this is what you want, locate the Utilities/Option for "System / Account Lookup – Use Street # in Address Search" and edit the setting to "No".

Filtering

Filtering is where you reduce the list of records that are displayed. For example, you are already familiar with filtering your account list to hide the inactive accounts. Now you can also filter on any of the search fields, aside from Account #. To apply a filter, *right-click* on the column heading and the filter dialog appears. Use the "Starts With" or "Contains" options to specify your search criteria, such as contains "Scott" and press <Enter> or click "OK". Now the list of accounts you see are limited to just those containing the word "Scott" in any part of the full name. Now *right-click* on the City column heading and enter contains "spring" as the Scott you want lives in Springfield. Note the asterisk that appears in the column heading when a filter is being used. To remove a filter, open the filter dialog and click "Remove Filter." Whenever you leave and return to the Account Lookup screen, all filters are automatically cleared.

Enhancements to Delivery Zone/Route

Previously, you assigned a delivery zone code in the Site Information screen. This information is now assigned in the Fuel Scheduling screen. In this way you may assign multiple scheduled fuels to different routes or zones.

Scheduled Fuels											
Fuel	Tkt	Туре	Drop	Factor	Zone	Last	Next				
1-#2 OIL RES		A/H	150/275	11.5 K	5	04-19-14	7265				
16-PROPANE		C/W	70/120	90 C	2	07-09-14	10-07-14				

Another change you may notice is that you can only enter a *valid* zone code. You can either type in the code or select it from the Pick list. Manage your zone list from the "Utilities / More / Delivery Zone" menu. A zone code must be between 1 and 4 characters, which can now be a combination of numbers *and letters*. You may also enter a zone description to better describe the details for each zone, for example the towns serviced by a particular route.

New Feature: Sales Tax Consolidation

Previously, a separate tax record was added after each taxable item you entered. The taxes were consolidated into a single entry at the time the batch was posted. However if the invoice was printed prior to this, it may not have looked very elegant. To work around this, you may have opted to not have the taxes be automatically added, and instead perform the math yourself and post the tax at the end of the invoice. This is not an ideal practice as it can be a source of error.

This issue has been corrected by automatically combining the sales taxes into a single total tax as you post each charge.

Be sure that your taxable transactions are coded correctly so the tax is automatically added.

New Feature: Service Contract Billing

You can now track parts and labor costs that are covered under a service contract. Customers are invoiced for these items at no cost but you can establish and track your cost, making it much easier to monitor the profitability of your service contracts. Additionally, if you are required to pay sales tax on the cost of your service contract parts, you will find a new report for this specific purpose. Learn more about setting up and using this new feature by referring to the white paper "DRM Service Contract Costs".

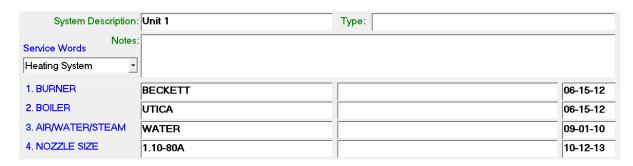
Enhancements to Service Information

There have been significant enhancements to how you manage and track service information. You can now:

- 1. Define multiple systems for each account
- 2. Enter an additional note about each service item
- 3. Track the history of service readings

"F3" on the Daily Work menu is now labeled "Service." Select it to see the history of service calls to this location. This is where you go to enter a proposal (F5) for a new job (refer to the whitepaper on proposals for more information on this new feature). Click "F6 – System Info" to open the Service Information screen. This shows information about this account's first system. A message in the upper-right heading section alerts you to how many systems are recorded for this account and allows you to scroll through each one. Select (F3 – New System) to setup an additional system.

There are 15 records available to describe service specifications such as nozzle size or boiler model, and this information prints on most work orders.



Use the Service Reading History screen (F2 – Readings) to track the history of combustion tests etc. and record new entries.

Date	Note	Gross Stack	Net Stack	CO2	Smoke	Draft O.F.	Draft O.B.	Efficienc
08-08-13			450	11%	0	02	04	81.0%
08-05-12			455	9%	0	03	05	83.0%
08-21-11			448	10%	0	01	03	84.0%
09-09-10			450	12%	0	02	04	82.5%
09-04-09			450	12%	0	02	04	82.5%

Each of the 15 service records is comprised of a Service Word Label, Value, Note and Date. The labels are defined for the specific system you select. In this way you can assign a different set of codes for a variety of systems, for example Heating System, A/C system, propane setup.

Enhancements to Transaction History

You can now perform filtering on certain columns similar to the new account lookup filtering. Right-click on the column heading to display the filter dialog. The following columns can be filtered:

- <u>Date:</u> various choices to show transactions for a single date, transactions earlier or later than a cutoff-date, or transactions between a range of dates
- <u>Tran #:</u> various choices to show a transaction matching a single value, transactions less than or greater than a number, or transactions between a range
- Ref #: starts with a value or contains a value. Remember that Ref # is now no longer just a number.
- <u>Amount:</u> various choices to show transactions matching a certain amount, transactions less than or greater than an amount, or transactions between a range

There is a new option "System / Transaction History – Sort Oldest to Newest". that allows you to establish the preferred transaction order in the register. Transactions are initially displayed sorted oldest to newest, but you may prefer the opposite.

There is a new option "System / Transaction History – # Months History to Display". This is a way to limit how much history you normally see on this screen. For example, you may find five years to be more than enough, and if so set that option to 60. It is initially set to 0, indicating that all history is displayed. If you do decide to limit history, you can always override it by resetting the date filter.

New Feature: Account Type

This is new field for distinguishing between various Trade Classes. Edit this value in the Site Information screen. We have started your list with some suggestions like Residential, Commercial, Tax Exempt, Farmer, Government but you are free to edit this list from the "Utilities / More / Acct Type" menu. Just like with Account Status, each Account Type has a sequence number (1,2,3, etc) and you can rearrange the order to suit your preference.

The account type is displayed on the dashboard above the Account Status and you may assign a variety of colors to them. Account Type is available in Custom Reports as either AcctType (the name) or AcctType# (the sequence #)

Enhancements to Default Ticket Memo

You may already be familiar with specifying a <u>Default Ticket Memo</u>, ie. the memo that is automatically selected when open the Meter Ticket screen. You can now assign a particular memo to a specific fuel that will be used instead of the default memo. Assign these types of memos in the Fuel Maintenance screen. A fuel-specific memo *always* overrides the default memo in the meter ticket screen. If you are printing a batch of tickets for a delivery route, the fuel-specific will over-ride the any memo you enter for the batch.

New Feature: Account Contacts

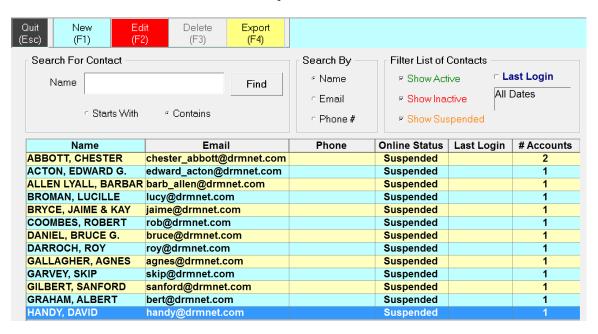
Account Contact is the new way for settings up and managing email addresses. You may now assign one or more contacts to an account. A contact is a person, so you need to specify their First and Last Name. You also need to indicate the relationship this contact has with the account, for example, "home owner", "office manager", "custodian". Because this contact record will be used for emailing and potentially *granting online access*, an email address is also required. An account can have more than one contact (for example both wife and husband). Similarly, a contact can be linked to more than one account. Finally, you need to indicate how this contact will be handled when you send emails to any of their linked accounts, by selected either "To" or "CC" recipient, or instead indicate that emails should not automatically be sent to this individual.

There are 2 ways for working with account contacts. Use the master Contact Manager to list all available contacts, or when working on a particular account just show the contacts assigned to this account (accessed via the Billing screen).

Let's start with the master Contact Manager. Open this screen by choosing "F7 / Contacts" from the "Account Lookup" screen.



You may already have a lengthy list of contacts to work with, because we attempted to automatically create contact records for you during the upgrade process. A contact record would have been created for any billing record that had a valid email address at the time of the upgrade. Every account that referenced that email address has been linked to this contact. These contact records show "From DRM" as the relationship.



Enhancements to Emailing

In addition to the new Account Contact feature, there have been several other changes to emailing from DRM.

- You are no longer limited to emailing just an invoice or statement. Any report can be emailed that lets you choose the option "Current Customer".
- You now have the ability to add an attachment to an email.
- You can assign a default email text body message that will be automatically added to each new email you create. Some internet service providers are flagging emails without a message as <u>Spam</u>. The initial message we created for you is "Thank you for your business!" To change the message, navigate to the Utilities (F7) / Options (F7) menu and edit the record for "Email Settings / Default Text in Email Body"
- You can assign an email address for each of your users. The reply-to address can then be changed at the time you send the email. There may be times when replies should be sent to a generic "info@" mailbox and other times when the reply should be sent directly to a specific individual.
- A note is now saved for every email that is sent. The note will show who the email was sent to as well as the subject line. The message will also be saved but only if it has been personalized (ie. is different from the default message). Similar to the Void category notes, email notes are generally hidden from the normal display. To see them, click the "Type" filter located on the notes grid heading and select the entry for "Show Emails".

Enhancements to Budget Reset

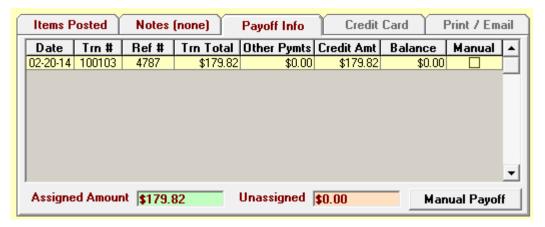
There have been several enhancements to the budget reset screen

- 1. If you adjust a fuel's projected price, it is automatically saved and used for the next budget you reset.
- 2. The calculated value for the number of gallons used in the past year is based off the "YTD Gallons End Date" shown at the top of the screen, next to the menu. You can adjust this date and then it will be remembered for the next budget you reset, helping to ensure that all your budgets are based off the same information.
- 3. Notice the new "Round Payment" choice next to the calculated Budget Payment. You can select from *None*, \$1, \$5 and \$10 and it will round the monthly payment accordingly.
- 4. When you save the new budget plan, a <u>"Budget"</u> category note will be also saved. This note will reference the relevant information used to determine the selected plan, and will make it easier to explain the process to a customer if they have questions.

New Feature: Open Item Billing

Open item billing is a new option that may be appropriate for certain customers such as commercial accounts. After you configure an account for open item billing, you will be <u>required</u> to manually match-up payments with the appropriate invoices. With balance forward billing, invoices are automatically paid off in date order, although it is possible for you to manually override these choices. The alternative (and default setting) is **Balance Forward Billing**.

There are two ways to edit how credits are applied. From the "Post Credit" screen, select "Payoff Invoices (F9)" from the menu. From the Transaction Viewer screen (shown below), select the "Payoff Info" tab as shown and then click "Manual Payoff".



Either of these choice will open the new "Invoice Payoff Manager" screen. This screen shows you a list of invoices that have already been paid-off by this credit, in addition to any other invoices that have not been completely paid-off yet. You can now determine how to correctly apply this payment. If you type in either the Ref # or Invoice #, the appropriate invoice record will be selected. Alternatively you can select the desired invoice by clicking on it. You will be now be prompted to indicate the "Amount to Apply". The default amount that is automatically filled in is one of two values: either the <u>unpaid</u> amount on the selected invoice or the <u>most</u> that can be applied to this invoice from this credit's available balance. Edit the amount you wish to apply if you need to, and then click "Apply Credit." To remove a previous pay-off application, click the "Clear Credit" button.

Open item customers may also prefer a new statement style that lists unpaid invoices.

By default, all your existing accounts have been coded as balance forward. To change an account to open item open the site information screen and click the choice for "Open Item"

Note that you <u>will not</u> be able to perform a "Reset Payments" on an account configured as Open Item. Additionally, any transactions that have been manually matched up are not affected by such a Reset Payment. You will see a check in the Manual field to indicate that an invoice was paid-off manually.

Enhancements to "Move Balance"

The Move Balance feature allows you to either manipulate an account's sub-category balance breakdown (example: reclassify a Regular portion as Budget), or transfer some part of the balance to another account (example: pay charges for 2 accounts from a single payment).

Previously, you were restricted to only being able to move an <u>available balance amount</u>; in other words you could not transfer a \$200 credit to another account if this account did not have at least a \$200 credit balance. This restriction has been eliminated and you may now enter any amount desired.

Performing a Move Balance always results in two <u>Adjustment</u> transactions; one a credit and the other a charge for the same amount. Previously if you deleted either of these adjustments you had to remember to also delete the other. Now the second adjustment is automatically deleted!

New Feature: Tank Usable Size

You can now distinguish between a tank's rated size and its actual capacity or usable size. The tank size prints on a meter ticket. Calculations related to k-factor scheduling are based off the usable size. The ITA is also based off the usable size.

To start with, as part of the upgrade process, all usable sizes have been set to the same value as the tank size. When adjusting a usable size be aware of the special relationship between the 3 fields: <u>Tank Size</u>, <u>Usable Size</u> and <u>ITA</u> and make any changes in the correct order. Tanks Size must be greater or equal to the Usable Size and Usable Size must be greater or equal to the ITA.

New Feature: Credit Hold

A "<u>Credit Hold Administrator</u>" can indicate that an account is on "Credit Hold". It will not be possible to print a ticket for any account with this status. If you try to print a Meter Ticket, you will be alerted that a Credit Hold is in place. If the account is coded for automatic delivery it will no longer be included in the normal route listing when it's due for a delivery.

To grant this level of control to a user, edit her/his user record and check the box labelled "<u>Credit</u> **Hold Admin**"

In the "Site Information" screen, check the box next to "Credit Hold". Only Credit Hold Managers have the ability to set or remove this status. Other users will not even see this choice.

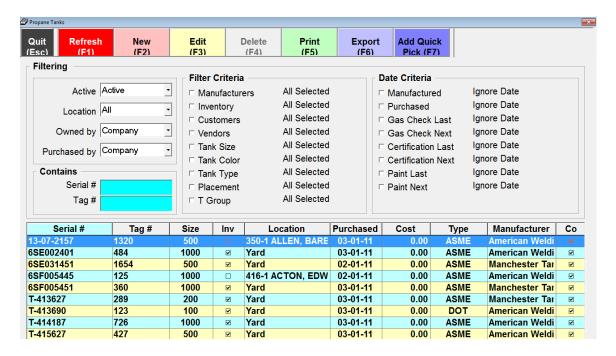
You can list the accounts on Credit Hold by creating a custom report based off the criteria "Cred Hold = "Y"

Custom Report Enhancement - # Days Ago

Previously, for example say you wanted to list customers who had an open charge that was at least 10 days old, you would have been required to specify what the actual date was 10 days ago. This was okay if it was a one-time report but if it was a saved report that you wanted to run again, you were required to figure out and edit the special date every time. Now you will find it much more convenient to use the "# Days Ago" criteria option. In this example you would first choose "DtLastChrg" for the field. Select "Greater than" for the operator. Now select the choice for "# Days Ago" instead of indicating a specific date. Enter "10" for the value and finally "Add" this rule to your criteria. Next time you run this report, you won't have to change anything!

New Feature: Propane Tank Inventory and Tracking

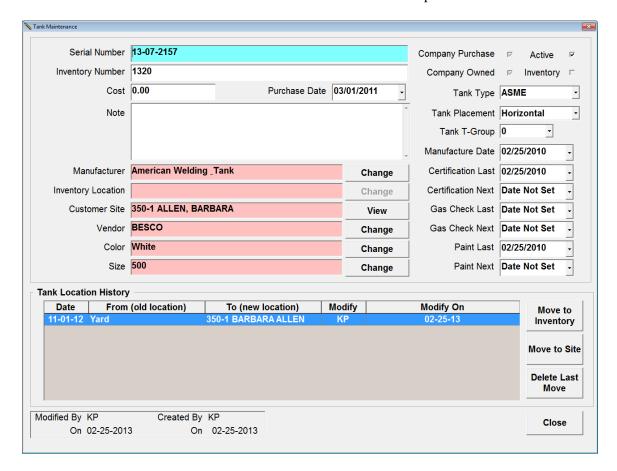
Access the Propane Tank Management screen from the "Inventory / Tanks" menu. Tanks are either company owned or customer owned. Tanks are either stored at one of your yards or are located at a customer site. Use the filter criteria to help populate your list. For example, display all the 100 pound cylinders that are in the yard. The list can be printed or exorted to Excel.



Each tank has a number of attributes; some like serial number and size are required. When you set a tank at a customer location, click the button for "Move to Site". You will be prompted to select the account and the date it was placed there. You will also be asked who owns the tank after this placement. To move a tank back into the yard, click the button for "Move to Inventory". The tank location history shows where the tank has been. Use the Date fields for Certification, Gas Check and Painted to track maintenance.



When a customer has tanks at their location, you will see a label like this next to the tank gauge on the dashboard screen. Click it to see the list of tanks there. Double-click on a tank record to open the Maintenance screen.



New Feature: Note Colors

To help a particular note category stand out from others in the notes history list, you can assign a custom color to it. For example, all the collections call related notes "CALL \$\$\$" may be colored orange.

To assign the color, navigate to "Utilities (F7) / Notes (F4). Select the Note category to edit and choose "Edit (F2)". At the bottom of the edit screen you see the color currently assigned or "N/A" when none. Select "Pick" to assign a color or "Clear" to remove an assigned color.

New Reports

- "Credit Card Authorizations" lists all outstanding authorizations.
- "Credit Card Returns Submitted by Date" lists any returns that were processed for the specified period.
- <u>"Fuel Deliveries Totals for Mailing"</u> prints a new page for each account included in the criteria. The page is formatted for a tri-fold and a #10 envelope. The detail section of the report identifies the selected period and then list the total amount of fuel delivered for each product.
- "Job Information" lists all the service calls over a period for which a work order was generated. You can filter by various work order attributes like job code, status, billing or even search on the job information or notes. This is a drill-down report so you can view the actual work order from the grid. You can also print out the report or export it to excel.
- <u>"Payment History"</u> is available from the "View Trans / Print History Menu". It lists all the credits posted for the criteria provided and shows what invoices were paid-off
- <u>"Invoice History"</u> is available from the "View Trans / Print History Menu". It lists all the invoices posted for the criteria provided and shows what credits were applied to pay them off.
- "Scheduled Service Information" is similar to the "Scheduled Fuel Information" report. A wizard helps you list scheduled service records for various scenarios.
- <u>"Will Call List"</u> is available from the "Schedule/Deliveries" menu. This report has a wizard to help you isolate the will call accounts who may be in need of fuel.

Miscellaneous Changes

- 1. Print Current Balance on an Invoice. This is a new option, that when selected, will print the account's current balance along with a "Current Balance" message at the bottom of an invoice. If you prefer that this option always be selected by default, edit the option "Printing / Invoice show current balance by default".
- 2. The dashboard shows a new label "Since:" in the upper-right Site Information section. This shows when an account became active. It is color-coded; Red for less than a year, Orange for less than 3 years, otherwise Green.
- 3. The "<u>Show Directions</u>" link now works with the new Google Maps and you no longer have to switch to classic mode. Remember you also have a choice between using Google Maps or Mapquest. To set your preference, edit the Option "System/Map System To Use"; enter "G" for Google and "M" for Mapquest.
- 4. <u>Statement Sorting:</u> You now have 2 choices for specifying the order in which a group of statements is printed -- by Customer Name (the default) or by Account #. To switch to Acct # ordering edit the option "Printing / Print in order of Account #" and change the value to "Yes"

- 5. <u>"Autopost Boost Mode"</u> is a new setting for the month-end wizard that will just process your <u>Autopost</u> transactions instead of requiring you to also age all your accounts. To enter boost mode, first uncheck the option for "Process Finance Charges/Interest Credits" if they are checked. Check the option for "Process Auto Post" and you will then be able to uncheck the option for "Account Aging". At this point Boost Mode has been set and you will see the lightning bolt that reflects this.
- 6. You can now process Credit Card transactions from the Meter Ticket screen by selecting "F5" from the menu. Very useful if you are either charging or authorizing the card at the time of order.
- 7. If you prefer that all your credit card transactions be included in the same batch regardless of who processed it, you will appreciate this new option: "Credit Card Save trans to this user's batch". Simply enter the username for the appropriate user and henceforth every credit card transaction will be saved to this user's batch (other user's should first logout and then back in after you make a change like this).
- 8. You may now control the ability to delete office notes. Only users with the delete permission for "Office Notes" checked can delete notes. Everyone else will see a message that they do not have permission.
- 9. The invoice viewer has a new section/tab showing whether the invoice has been printed or emailed. If so, it will show when and by whom.
- 10. While editing a delivery route you can quickly move all selected stops to another route by right-clicking and choosing "Move to Different Route". You can do the same thing from the Saved Tickets list.
- 11. You can now print invoices on the same thermal paper that you print credit receipts on. Useful if you need to hand over Point of Sale receipts.
- 12. You will now be reminded about any outstanding "Autopost" transactions when you log-out.
- 13. There was a bug with running a Custom Report that listed more than 32,000 accounts. This has been fixed!
- 14. You can now delete unwanted parts from your inventory parts list!
- 15. You are already familiar with the "Date of Last Credit" that is displayed on the customer dashboard. Now you can control what transactions are linked to this display. For example you may only want it to reflect payments received but not transactions like adjustments. This preference is controlled from the "Show on Dashboard" option in the "Post Word" edit screen.
- 16. The "Print Label" wizard has a new option to sort the labels by Zip/Postal Code.
- 17. A Statement will no longer show a budget or regular balance unless there is one.
- 18. The "Deliveries By Truck & Driver" report now has an option to "Display a Transaction Breakdown." When selected the totals of each type of product delivered are also displayed.

- 19. There is extra space to enter additional information in the Comments field when posting a Credit or Invoice. A comment can now be up to 25 letters.
- 20. The Statement no longer prints "Page 1 of 1" when there is a single page.
- 21. A Part Description can contain up to 30 characters.
- 22. When setting an account to an <u>Inactive</u> status, you are now required to select the effective date. This field is available in Custom Reporting as "DtInactive" so you can report on the accounts that went inactive during a specific time frame. An "Inactive" category note is also automatically saved when an account is made Inactive.
- 23. In Posting, the first Scheduled Fuel is now always selected by default.
- 24. There is a new option "Meter Ticket Screen Default to Save Ticket" that will select the "Save" option instead of the "Print" option. Useful if you have progressed to Dispatching and no longer print tickets.
- 25. You may assign one of your statement notes to be selected by default in the statement wizard screen. Open the Statement Note Editor and check the box next to "Default Statement Note." Only one note can be selected as the default and it will always be the last one checked. To eliminate the default note, simply remove the check.
- 26. You may assign one of your Statement/Invoice Memos to be selected by default similar to how you assign a default Ticket Memo. First discover the number of the memo you wish to assign. Open the "Utilities/Options" screen and set the category filter to "Statement/Inv Memo". Each of the records has a different number assigned, for example "Memo_4" would be number 4. Next you need to set this number to be the default choice. From the same "Utilities/Options" screen set the category filter to "Printing". Edit the entry for either "Default Invoice Memo #" or "Default Statement Memo #". Assigning a value of zero serves to not assign a default memo.
- 27. You can now "View Trans" from the "Post Trans" menu. Useful if you want to quickly see the latest transaction history after posting a new item.