



This document describes the various enhancements and modifications to DRM Windows that occurred between versions 7.6.240 and 8.3.254.

Enhancements to Set Fuel Prices

You can now access this screen from two additional locations: from the Degree Day screen and from the Fuel Inventory screen. Previously both Cost and Retail Price were set when you saved a price change. Now you can choose to skip updating one of these values by unchecking the box to the right of the amount as shown in the example below. In this example only the fuel cost is changed and whatever Retail Price was previously in effect on 8/1/15 will remain.

Cost:

Retail Price:

Effective:

Enhancements to Transaction Finder

Previously you were required to search for something like a specific ticket # or dollar amount etc. Now you can bypass that requirement by clicking the option next to “Ignore (N/A)”. Click Display List to show ALL records with a transaction date that matches your date range.

Use the “Transaction Edit Date” controls to limit the transactions displayed to those that were entered or modified during a particular period. For example, you finished entering all your 2014 transactions and closed out the year on January 7th. Later on someone backdated something for 2014 and now you want to find it. So you would set your transaction period to 2014 and the Edit period to be after 1/7/15 as shown below.

Transaction Edit Date

Start Date Ignore

End Date Ignore

Transaction Edited after 01-07-2015

Enhancements to Saved Tickets

You can now use filters to work with your list of saved tickets. Right-click anywhere in the column that you want to filter on to display the criteria dialog. You can filter on City, Zone, Delivery Date and Fuel. An asterisk (*) appears in the column header to indicate a filter is being used. The filters are reset when you exit the screen.

Now you can move tickets directly from this screen to an existing route. Simply select the ticket or group of tickets you want to move and click “Add to Route (F3)”. You will then be prompted to select the route from the route picker.

New feature: Collection Call tracking

You may already have one or two different note categories that you use for the purpose of recording collection call activity. If not create a new one called “Call \$\$\$” for example. Now edit each of these categories and check the box next to “Collection Call”.

The screenshot shows a 'Note Maintenance' dialog box with the following fields and options:

- Code:** CALL \$\$\$
- Active:**
- Description:** Called for payment
- Note Code Color:** Pink color swatch, with **Pick** and **Clear** buttons.
- Default Type:** The default type is automatically selected when you add a new customer note
- Collection Call:** Indicates that this type of note is related to documenting a collection related communication
- Footer:** Last Modified by KP on 03-21-15 09:57

The regular balance aging report is useful for monitoring overdue balances. There are sometimes limitations on how often you can contact someone re. collections. Now you can choose to print the date of the most recent collection call on this aging report instead of the phone #. The date that is printed is extracted from only the most recent collection call note that has been saved for the customer.

The screenshot shows the 'Report Options' dialog box with the following options:

- Show Phone #:**
- Show Most Recent Contact Date:** (highlighted with a dashed border)
- Active Accounts:**
- Inactive Accounts:**

Enhancement to Custom Reports -- Date Function

There are occasions when you want to report something that happened on predictable dates like yesterday or last month. Previously you probably had to change the date every time you ran the report. Now you can simply choose Date Function as shown below.

The screenshot shows a three-paneled dialog box for configuring a report criterion. The left pane lists various data fields, with 'DtBurnCln' selected. The middle pane lists comparison operators, with 'Date Function' selected. The right pane shows a list of date functions, with 'Last Year' selected. An 'Add To Criteria' button is located at the bottom right.

DropQty	Less Than	Last Month
DtAdded	Less Than Or Equal	This Month
DtBurnCln	Greater Than	Last Year
DtInactive	Greater Than Or Equal	This Year
DtLastChrg	Between	Yesterday
DtLastCred	Not Between	Today
DTLastDel	Starts With	
DtLastDelAny	Not Starts With	
DtLastFinCh	In List	
DtLastServ	Not In List	
DtLastServ2	Contains	
DtNextServ	Not Contains	
DtNextServ2	Is Null	
DtStmt	Is Not Null	
FctrSum	Date Function	

Add To Criteria

Click “Add to Criteria” and the following rule is added.

AND	DtBurnCln HAPPENED Last Year
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Miscellaneous Changes

1. **Multiple Phone Number searching.** Only the primary site phone number is displayed on the Account Lookup screen but you can now find an account by one of the other 5 possible phone numbers. You must use the Phone Number filter to perform this search instead of the “Find” button. Right-click on “Phone 1” column heading to display the filter dialog. Enter the phone number into the Contains box and click OK. The area code is optional and if you do include it, the phone number should be entered like 508-945-1300. Now every account that is displayed has the phone number you just entered. Note that since only Phone 1 is actually displayed on this screen you may not see the correct phone number on this screen.
2. **Fuel & Tax Summary 2** is a new and more paper-friendly report that you may prefer over the original Fuel & Tax Summary report (which is now named Fuel & Tax Summary 1). Compare them both and decide for yourself.
3. Only Active accounts are processed by default when you perform a month-end aging. You can override this if desired.

4. Each new fuel invoice that is saved will now record if the customer was on Automatic schedule at the time. This will allow you to report on Auto vs Will Call units sold from the Fuel Deliveries report.
5. The USPS sells stamped #9 envelopes with your return address pre-printed. However the position of their window is not compatible with the standard Invoice and Statement reports. Contact us if you prefer to use these envelopes and we will help configure DRM to print correctly.
6. You can now skip the Verification step when using Authorize.net to add a new credit card to the vault. Generally you should only do this in the event the card had no available funds at the present time and you are sure the card information is valid.
7. “Bing” maps and directions is now supported. To set Bing as your preference, edit the option for “System/Map System to Use” and enter a “B” for the value. Try it out as an alternative to Google maps.
8. “PortalActive” has been added to the list of Custom Report fields. “Y” indicates that an active contact associated with the account has logged in to the portal.
9. T-Groups can now be color-coded. Also the limit on the number of groups has increased to 99.
10. The Account Type, Status and Source fields have been added to the New Customer screen.
11. You can choose on an account by account basis whether to print the current balance on a Meter Ticket. Control this from the Site Information screen. Use the new custom report field “ShowBalOnTkt” to identify these values. Note that this setting is only applicable to your meter ticket if is designed to normally print a balance.
12. A “Not Done” choice has been added to the Meter Ticket Quit screen which will allow you to return to edit the meter ticket.
13. The following scheduling information will no longer print on meter tickets for Will Call customers: Drop, K-Factor, Next DD, H/W or Run Out DD.
14. The transaction detail report now displays the Ref # and summarizes the number of records.
15. Added support for Budget Coupons with your name/logo preprinted.
16. The bug that may have prevented you from saving a new statement memo has been corrected.
17. You can now delete an account contact if they are not linked to any accounts.
18. Press Control-P from the Report Viewer to open the printer dialog. You can use the same shortcut in most other applications that you print from.