



*This document describes the various enhancements and modifications to DRM Windows that occurred between versions 8.3.254 and 8.3.258.*

## **New Feature: Route Optimization**

The stops for a fuel delivery route can now be exported either to an excel spreadsheet or to one of two third party applications that support route visualization and optimization: MapQuest or MyRouteOnline

Export Stops		Excel	Excel	Mapquest	MyRouteOnline	Ne
Fuel	Tkt	04-11-16	175	157	275	
OIL CML						

### **MapQuest Route Planner**

This is a free online service that will help you manage a route containing up to 26 stops.

- MapQuest can optimize the route by sequencing the stops according to Shortest Distance or Shortest Time.
- Directions to each address are listed. Also shown is the customer's name and quantity of fuel to deliver.
- The route and directions can be printed, emailed, texted to a smartphone, or sent directly to an OnStar or Sync onboard Navigation system

1. First build the route in DRM. This can be a combination of Automatic deliveries and Saved Tickets for your Will Call orders.
2. Select MapQuest as the export destination and then click the "Export Stops" button. The MapQuest website will open in a browser window.
3. Click on the tab "Copy & Paste Area" to display the Address editor. Right-click inside the address box and select Paste. Now all the stops are listed.
4. Click on "Get Directions". MapQuest will first validate all the addresses. Look for the green checkmark next to each one.
5. Click "Get Directions" again to display the map and detailed directions.

**C** 61 School St  
Chatham, MA 02633-2434  
[Search Nearby](#) [Zoom](#)  
IGNATOWSKI, JIM / FILL  
[Edit Note](#)

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1. Start out going south on School St toward Hallett Ln. 0.1 mi
2. Turn left onto Water St. 0.05 mi
3. Take the 1st right onto Silver Leaf Ave. 0.2 mi  
*If you reach Main St you've gone a little too far*
4. Turn right onto Main St. 0.01 mi
5. Main St becomes Morris Island Rd. 0.2 mi
6. Turn right to stay on Morris Island Rd. 0.8 mi  
*Morris Island Rd is just past Dune Dr  
If you are on Little Beach Rd and reach Seagull Rd you've gone a little too far*
7. Morris Island Rd becomes Tisquantum Rd. 0.3 mi
8. Turn right onto Attucks Trl. 0.1 mi  
*Attucks Trl is just past Tilpi Run St*
9. 137 ATTUCKS TRL is on the left.

This section of your trip is 6 minutes / 1.79 miles

**D** 137 Attucks Trl  
Chatham, MA 02633-2571  
[Search Nearby](#) [Zoom](#)  
UNDERWOOD, FRANK & CLAIRE / FILL  
[Edit Note](#)

**mapquest**

Online Offers  
 Chatham Hotels  
 Chatham Restaurants

Free App | Print | Send | LIVE TRAFFIC | MAP

Drag the icons to Re-Order Your Stops

- A 352 Main St, Chatham, MA 02633-2428
- B 450 Main St, Chatham, MA 02633-2456
- C 61 School St, Chatham, MA 02633-2434
- D 137 Attucks Trl, Chatham, MA 02633-257
- E 500 Shore Rd, Chatham, MA 02633-236
- F 62 Anne Blairs Rd, North Chatham, MA 0
- G 713 Crowell Rd, North Chatham, MA 026
- H 52 Court St, North Chatham, MA 02650-1
- I 847 Orleans Rd, North Chatham, MA 026
- J 192 Round Cove Rd, Chatham, MA 0263
- K 204 Old Comers Rd, Chatham, MA 0263
- L 23 Jeanette Dr, Chatham, MA 02633-15C
- M 162 Horizon Dr, Chatham, MA 02633-17C
- N 209 Indian Hill Rd, Chatham, MA 02633-
- O 125 Ocean Port Ln, Chatham, MA 02633

70 Queen Anne Rd »  
 Chatham, MA 02633-1831

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## MyRouteOnline

MyRouteOnline.com is a subscription service that offers additional features to the MapQuest options.

You transfer the address list from the DRM route by copying and pasting just like with MapQuest. You can import up to 350 stops at a time.

You can support multiple drivers by dividing the stops into multiple routes.

You can send a route to a smartphone or supported GPS device.

Visit their website to learn more about the complete features and pricing.

**GENERAL**

Departure Time: 8:00  
Service Time: 0 min.  
Lunch Break: 0 min., between 00:00 and 00:00  
Units: Miles  
Travel Mode: Driving

**MULTI ROUTING**

Number of Routes: 1 Route  
Max Route Duration: 0 H: 0 min. (0 - no limit)  
Max Stops per Route: 0  
Allow Deviation: Without Deviation  
Max Vehicle Size: 0

**EXTENDED TRIPS (OVERNIGHT)**

Hours per Day (overnight stay): 0

**OPTIMIZATION OPTIONS**

Goal: Minimum distance  
Mixed Territories: Allow  
Route Beginning: Pick Nearest First only if Start Address is set.

OPTIMIZE YOUR ROUTES IN SECONDS

Members Login | Free User, plan up to 6 addresses or Login

**HOW TO START**

- Import Addresses
- Plan Demo Routes
- Watch a Video
- User Guides

**1 ADDRESSES** Type or Import | **2 GOALS** Set parameters | **3 RESULTS** Manage routes

Filter: Green (18)

3 addresses have ambiguous geocoding results that require your attention (learn more)  
For the ambiguous addresses: Show Original Fields or Hide Original Fields

Title	Address	Srv.	Order	Size
<input type="checkbox"/>	Title (optional) Start address here			
<input type="checkbox"/>	Return (make it also the End Address) Recent Start Addresses...			
A	BATES, NORMAN 352 Main St, Chatham, MA 02633, USA	0		
B	COSTANZA, GEC 847 Orleans Rd, Chatham, MA 02633, USA	0		
C	RIPLEY, ELLEN 23 Jeanette Dr, Chatham, MA 02633, USA	0		
D	BICKLE, TRAVIS 52 Court St, North Chatham, MA 02650, USA	0		
E	LOUDON, DICK 70 Queen Anne Rd, Chatham, MA 02633, USA	0		
F	LOCKE, JOHN 450 Main St, Chatham, MA 02633, USA	0		
G	UNDERWOOD, F 137 Attucks Trail, Chatham, MA 02633, USA	0		
H	KILINGER, MAXV 62 Anne Blair S Rd, North Chatham, MA 02650, USA	0		
I	SHRUTE, DWIGH 500 Shore Rd, Chatham, MA 02633, USA	0		
J	LEBOWSKI, JEFF 192 Round Cove Rd, Chatham, MA 02633, USA	0		
K	CHAMBERS, DIA 125 Ocean Port Ln, Chatham, MA 02633, USA	0		
L	MALONE, SAM 162 Horizon Dr, Chatham, MA 02633, USA	0		
M	BENES, ELAINE 1340 Main St, Chatham, MA 02633, USA	0		
N	PETERSON, NOF 204 Old Corners Rd, Chatham, MA 02633, USA	0		
O	IGNATOWSKI, JIM 61 School St, Chatham, MA 02633, USA	0		
P	MONTOYA, INIGC 713 Crowell Rd, North Chatham, MA 02650, USA	0		
Q	SPARROW, JACQ 209 Indian Hill Rd, Chatham, MA 02633, USA	0		
R	CLAVIN, CLIFF 2 Westward Ho Dr, Chatham, MA 02633, USA	0		

Bulk Edit | Clear List | Export List

Import Addresses

**NEXT**

Map controls: Zoom All, Manual Changes, Print Map, Animate Directions, Enable Highlight on Mouse Movements

Map data ©2016 Google 500 m Terms of Use Report a map error

## **New Customer Tools**

- **Combine Duplicate Accounts**

This will move all transaction, workorder, office note and propane tank history from one account to another. First pick the master account. This should be the account with the most accurate Billing, Site, Fuel Scheduling and Service information. Select the duplicated account and agree to perform the move. ***Note that an inaccurate k-factor history will occur if fuel deliveries for both accounts are combined.*** The second account should now be deleted or made inactive to prevent it from mistakenly being used again. Note that no other account information from the second account is copied or moved. If there is additional billing or equipment details you will have to copy the information manually.

- **Swap Two Site Numbers**

If you have multiple sites for an account you can use this option to swap a pair of site numbers.

## **Enhancement to Authorize.net Credit Card Processing**

- **status.authorize.net** is a useful website for learning about processing issues or outages.
- If you use T-Groups to manage multiple divisions or DBA's, you can now specify a different merchant account for each entity.
- The cardholder and expiration details are displayed when you select a card to use.
- The credit card receipt will now print the name of the card-holder.
- You will not be able to close the credit card screen before the transaction completes processing.
- A budget credit card payment references the month the payment is for in the Comments fields. You can disable this behavior by editing the option "System/Authorize.Net – Show Month for Budget Payment."

## **Enhancement to Credit Available**

The *Credit Available* field on the Site Information screen has been renamed to *Credit Limit*, which represents the maximum regular balance an account can accrue. The Credit Available amount is now a calculated amount: Credit Limit minus Regular Balance, and is still shown on the dashboard and possibly may be printed on a ticket. Credit Available decreases as the regular balance increases and Credit Available increases as the regular balance decreases. Both Credit Limit and Credit Available amounts are available as Custom Reports fields.

There is a new option available to indicate the circumstances for when a Credit Available amount should be printed on a ticket. Edit the option "Printing/Print Available \$ Only for RBFP codes." Enter the letter for each of the account categories (regular, budget, prepay, fuel asst.) you wish to see included on the ticket. For example, "PF" will only print available amounts for Prepay or F/A accounts.

## Enhancement to User Security

- **Unpost Batch.** This permission allows the user to re-open a previously posted batch. You should first confer with DRM support staff to discuss the merits of enabling this option.
- **Void Transactions.** This permission allows the user to Void or reverse previously posted transactions, as long as they also have the Full Access permission for Daily Work

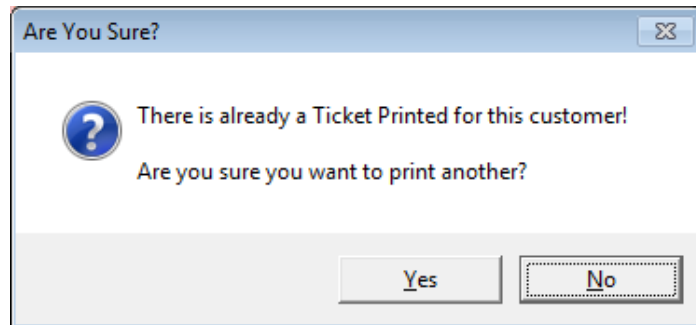
### Special Permissions

- |                        |                          |
|------------------------|--------------------------|
| Credit Hold Admin:     | <input type="checkbox"/> |
| Can Unpost Batch:      | <input type="checkbox"/> |
| Can Void Transactions: | <input type="checkbox"/> |

## Enhancements to Ticket Printing

If you attempt to print a ticket and the customer already has a ticket out for this fuel, you will be required to confirm your request.

You can disable this feature by editing the Option for “Printing/Require Confirmation to Reprint Ticket.”



Previously if there was an error when printing a ticket from the Meter Ticket screen, the screen would close and it would appear as if the ticket actually printed. Now you will remain on the Meter Ticket screen and have the options to try printing again or save the ticket instead.

## Miscellaneous Changes

1. The Scheduled Fuel report now has a Site Criteria option available. This will be useful for example if you want to list all the scheduled fuels in a particular town.
2. The Fuel Usage Chart now includes any relevant fuel taxes in the total sale amount displayed. Note that you can revert back to not including the taxes by editing the option for “System/Include Taxes on Fuel usage Chart.”
3. The Budget Reset screen now includes related taxes in the calculation of the estimated fuel cost.
4. Improvement to searching for a name with an apostrophe. Previously if you included an apostrophe (‘) in the search filter, you would skip past the desired records and end up at the end of the customer list.

5. New report "Tickets that were Deleted." This lists any Saved tickets that were deleted within the past 90 days. One more reason to consider saving tickets instead of printing when the order is taken.
6. Now you cannot print a Workorder for an account on Credit Hold.
7. The Sales Rep assigned to an account is now displayed on the dashboard screen in the upper-left section next to the Account #.
8. You can now Save multiple copies of a ticket. Useful if you make frequent deliveries.
9. You will now be required to select an Invoice Date when you create an invoice from a Proposal.
10. New custom report field: SchedFuelCount. This shows how many scheduled fuels an account has. Useful for identifying the accounts with multiple or no scheduled fuels.
11. Entering an email address for a customer is now easier once again! Several versions back we enhanced the way emails are managed to provide the flexibility of having multiple emails for an account. Unfortunately setting up an account contact record accurately generally requires a couple of extra steps. Now if a customer does not already have an email on file, you can simply enter the email address directly into the email field and save the record. The account contact record will be created for you automatically!
12. The Saved Ticket list now includes the 2<sup>nd</sup> street address and all 4 delivery info fields.
13. The Ticket Printed reports now show prices to 3-decimal places.
14. You can now print multiple copies of a receipt.
15. The Account Type code can now be printed on a ticket.
16. The Fuel Assistance available field has been added back to the New Customer screen.
17. The Account Information popup screen now shows the Account Type and Anniversary Date fields, similar to what is displayed on the dashboard.
18. The Scheduled Service report now includes Phone # and Search/Sort code fields.