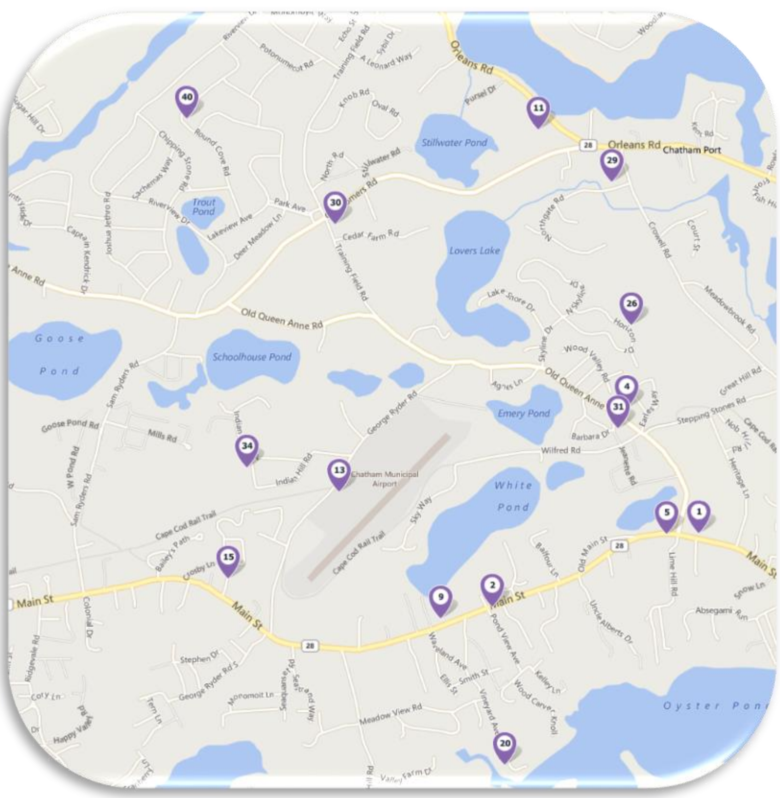
This document describes the various enhancements and modifications to DRM Windows that occurred between versions 8.3.260 and 9.1.270.

New Feature: Customer Mapping

The mapping feature lets you interact with a map showing multiple customer locations. Each address is displayed as a pushpin on the map and you can see the available options by right-clicking on a pin to show the menu. The choices will vary depending on the type of map you are working with. There are 3 types of map to choose from: Geocoder Map, Route Map and Delivery Zone Map.

In order for a location to be displayed on a map its **geocode** or GPS longitude and latitude coordinates must be known, and the Geocoder Map can be used to help with this.

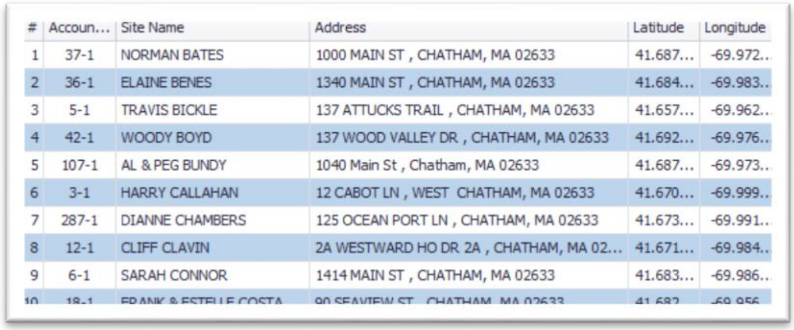
DRM Geocoder Map



From the Reports menu, open the report called **"Site Address"**. The address wizard screen can be used to filter the list of addresses to show. You will find it easier to geocode your addresses in chunks instead of all together. For example, do all the customers starting with an "A" first and then all the "B" etc.

Click "Show Map" to open the map screen for the list of addresses you selected.

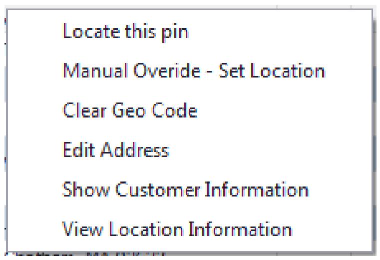
On the left-hand side of the map is the grid showing a row for each customer. If the address has a geocode there will be numbers in both latitude and longitude columns.



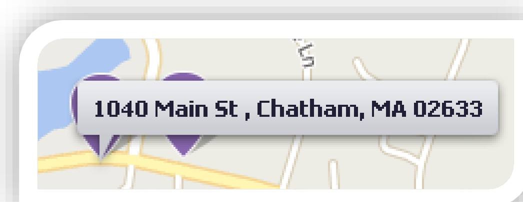
#	Accoun...	Site Name	Address	Latitude	Longitude
1	37-1	NORMAN BATES	1000 MAIN ST , CHATHAM, MA 02633	41.687...	-69.972..
2	36-1	ELAINE BENES	1340 MAIN ST , CHATHAM, MA 02633	41.684...	-69.983..
3	5-1	TRAVIS BICKLE	137 ATTUCKS TRAIL , CHATHAM, MA 02633	41.657...	-69.962..
4	42-1	WOODY BOYD	137 WOOD VALLEY DR , CHATHAM, MA 02633	41.692...	-69.976..
5	107-1	AL & PEG BUNDY	1040 Main St , Chatham, MA 02633	41.687...	-69.973..
6	3-1	HARRY CALLAHAN	12 CABOT LN , WEST CHATHAM, MA 02633	41.670...	-69.999..
7	287-1	DIANNE CHAMBERS	125 OCEAN PORT LN , CHATHAM, MA 02633	41.673...	-69.991..
8	12-1	CLIFF CLAVIN	2A WESTWARD HO DR 2A , CHATHAM, MA 02...	41.671...	-69.984..
9	6-1	SARAH CONNOR	1414 MAIN ST , CHATHAM, MA 02633	41.683...	-69.986..

If you use one of our 3rd party electronic meter interfaces such as Fleet Navigator, Digital Dispatcher or Base Engineering, it's possible that those systems have already provided the correct GPS data for the physical addresses.

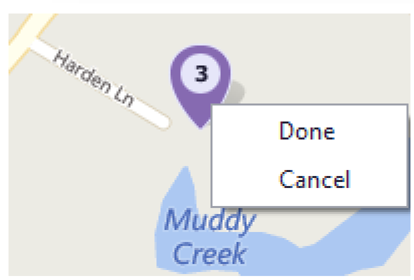
Click a row to select the address. Right-click to display the menu of choices. You can display a similar menu by right-clicking on a pushpin from the map.



- **<u>Locate this pin.</u>**
  A callout as shown here will appear on the map at the location of this address.



- **<u>Manual Override – Set Location</u>**
  Choose this to override the location suggested by the geocoder service. Left-click to place the pin on the map at the correct location for this address. Right-click when satisfied to show the menu. Choose "Done" to confirm this location.



- **<u>Clear Geo Code.</u>**
  Erases the latitude and longitude for this address.

- **<u>Edit Address</u>**
  Opens the address editor and provides a convenient way to correct any spelling mistakes.

- **<u>Show Customer Information</u>**
  Displays the Cust Info screen that shows delivery and service history for this account.

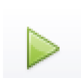
- **<u>View Location Information</u>**
  Shows details about the address and its geocode information such as the service that provided it or if it is a manual override.

Note the Navigation Bar below the map. You can click on the controls to move the map and adjust the zoom level.

Click the arrows to move the map left, right, up or down. Alternatively, click and hold the mouse down on the map (*but not over a pin.)* The shape of the cursor will change from a pointer to a closed hand. Continue to hold the mouse down while moving the cursor in the desired direction

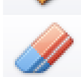
Click the "-" button to zoom out and see more map area but less detail. Click the "+" to zoom in and see more street detail. Alternatively use the scroll wheel on your mouse to zoom in and out.

Note the menu bar above the map. Click an icon to perform the desired operation.



This starts the process of geocoding any addresses with missing location coordinates. You will see the geocode details fill-in and pins appear on the map as this happens. You will be alerted when this process has completed or you can click the icon again anytime to stop the processing.

This shows the pins on the map if they were previously hidden.



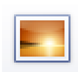
This hides the pins on the map.

This saves any geocoding changes to the database. You will be alerted to any unsaved changes when you close the screen.

This displays or hides the Navigation bar at the bottom of the map

This locks the map at the current position and zoom level. You will not be able to move or zoom the map until it is unlocked.

This displays the Print Preview screen from which you can print the map and pins or export it to a PDF or email it to someone. The preview screen defaults to sizing the map so it fits on a single sheet at landscape orientation but you can adjust by choosing Options from the menu.



This will save a picture of the map and pins as a JPEG image.

Note:

New accounts will be automatically geocoded when they are added to the system. You can disable this behavior by editing the option for “System / Mapping – Perform Geocode for New Account”. You can see an account’s geocode information from the Site Information screen. Click the “View” button next to the GPS coordinates to show the location on the map.

Tips:

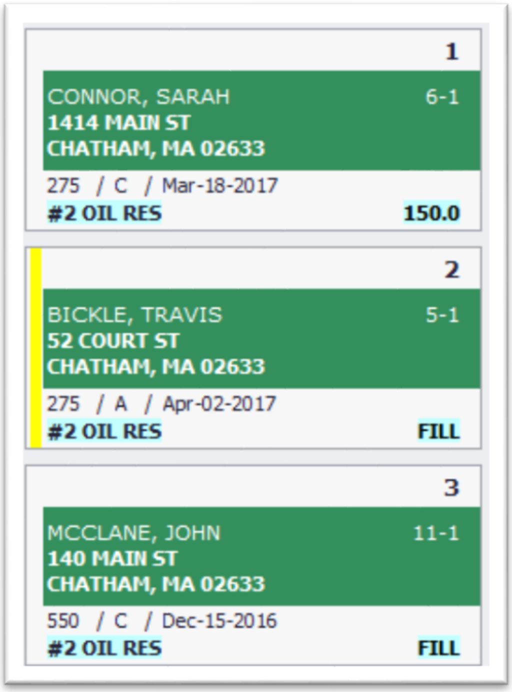
- **Sorting**
  If you click on a column heading the grid will be sorted by that column. For example click on “Latitude” and all the missing geocodes will appear at the top of the list.

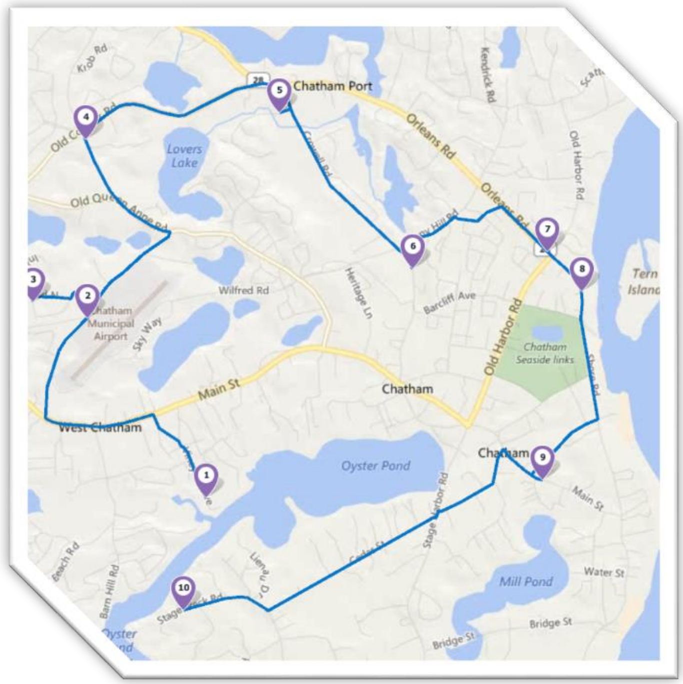
- **Searching**
  Right-Click on any column heading to display the menu of grid choices. Choose “Show Find Panel” to display the “Find” search box. All fields are examined in this type of search. Choose “Show Auto Filter Row” to perform column specific searching.

Bing Map Services:

Bing Maps is one of the choices for the source of your map tiles. In order to use Bing Maps, you will need to obtain a Bing Maps Key from Microsoft. Email us for instructions on how to accomplish this.

DRM Route Mapper



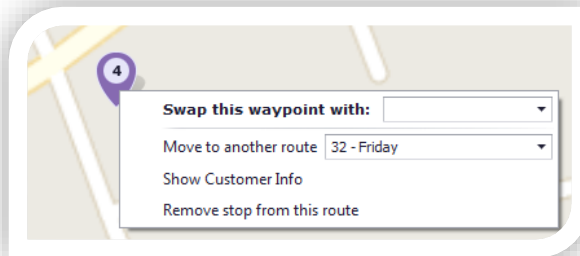


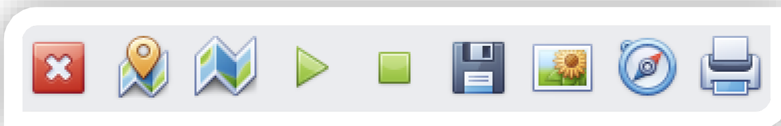
The Route Mapper screen displays details about all the stops along the delivery route and the suggested driving directions on a map. You can click on the pins to rearrange the sequence or see additional information about the customer. Open the Route Mapper screen by first editing a fuel delivery route and then clicking "**Export Stops**" for the "DRM Route Map" option.

There are two sections to this screen: the left-hand side shows a tile for every stop along the route and the right-hand side shows the map with pins for each stop location.

The tiles are shown in order of stop sequence and this number is displayed in the upper right-hand corner of the tile and also on the pin. The line below the account address block shows the date of the last delivery in addition to tank size and delivery type (Auto or Will Call). Automatic deliveries are also indicated by the yellow strip along the left-side of the tile. The bottom line shows the product to be delivered and the order amount.

Right-click on a pin to see this menu. Choose “**Swap**” to change the sequence of this stop with another address. Choose “**Move**” to remove the stop from this route and place it on another existing route. Choose “**Remove**” to remove the stop from this route and place it back on the unassigned list.

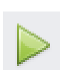




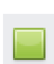
Note the menu bar above the map. Click an icon to perform the desired operation.

This calculates the driving directions to move from stop to stop along this route. Only directions for the first 25 stops are calculated. Note that this does not optimize the route by changing the sequence of the deliveries. The route to be driven is shown by the dark blue line connecting the pins. Note: a Bing Map account is required to use this feature.

This clears the driving directions for the route and removes the blue line connecting the pins.

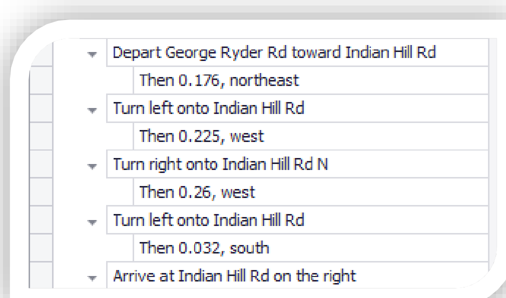


This starts an animation loop showing the selected route being driven. Follow the orange circle as it simulates driving the route visiting each stop.



This stops the driving simulation.

Notice the tab labeled “**Directions**” displayed in the upper-right corner of the map. Click it to see the detailed list of turn-by-turn directions

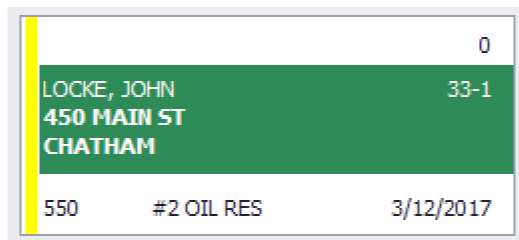


<u>Note:</u>

An alternative way to organize the delivery sequence is by ***<u>dragging and dropping</u>*** the address tiles on the left-hand side of the screen. Click an address tile and while continuing to hold the mouse button down, move the tile to the correct slot along the route. The sequence numbers are automatically adjusted to match this change.

DRM Zone Mapper

Open this screen by selecting "**Show Map (F7)**" from the Delivery Zone Setup screen. This screen will help you with the process of dividing your delivery areas into zones and assigning accounts to the appropriate zone.



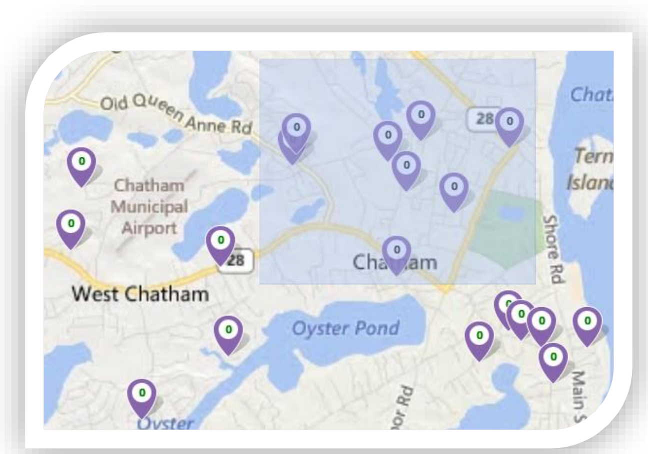
The layout is similar to the Route Map screen with address tiles on the left-hand side and the map on the right-hand side. Right-click a tile and choose "Locate this pin."

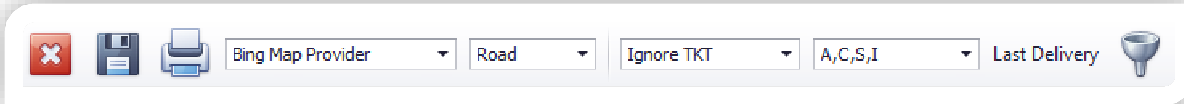
Note the number displayed in the upper-right corner of the tile. This is the sequence number within the zone and controls the order in which tickets are printed. To change the sequence #, right-click on a pin and edit the value next to "Sequence # within Zone."

You can move an address to a different route by right-clicking either the tile or the pin and selecting the correct zone from the list next to "Move to a different Zone".

<u>Note:</u>

You can edit multiple address at the same time by ***<u>multi-selecting</u>*** the desired pins. While holding down the "**Ctrl**" key click each pin in turn that you wish to include. The color of text of the selected pins changes from green to black. An alternative way to quickly multi-select a group of pins in the same vicinity is to lasso them using the selector rectangle, as shown by the shaded area on the right. Hold down the "**Shift**" key to begin drawing the rectangle.



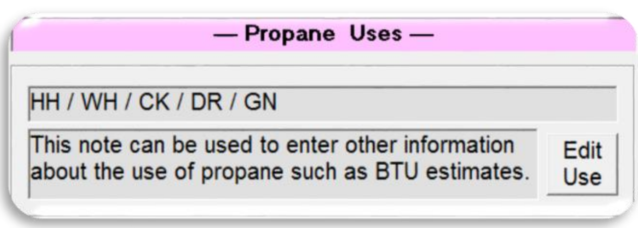


There are several filters included on the menu bar above the map. These filters can be used to reduce the list of customers shown on the map.

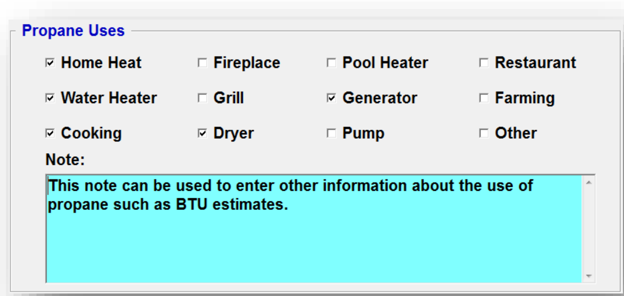
- **<u>Ticket Filter:</u>** Only show customers with or without a ticket printed. Default is to show both types by ignoring this value.
- **<u>ACSI Filter:</u>** "A" for *Auto* customers, "C" for *Will Call* customer, "S" for *Service Only* and "I" for *Inactive*. Default is to show all possibilities.
- **<u>Last Delivery Filter:</u>** Only show customers where the Last Delivery occurred either *<u>before</u>* the specified cut-off date, *<u>after</u>* the specified cut-off date, or *<u>within</u>* the specified date range.
- **<u>Fuel Filter:</u>** Only show customers who are scheduled to receive the specific fuels you choose.

New Feature: Propane Use

You can now add a <u>Propane Use</u> record for each customer to track how they use propane. The Fuel Schedule screen has a new section that shows a summary of the various uses at this location, as shown on the right.



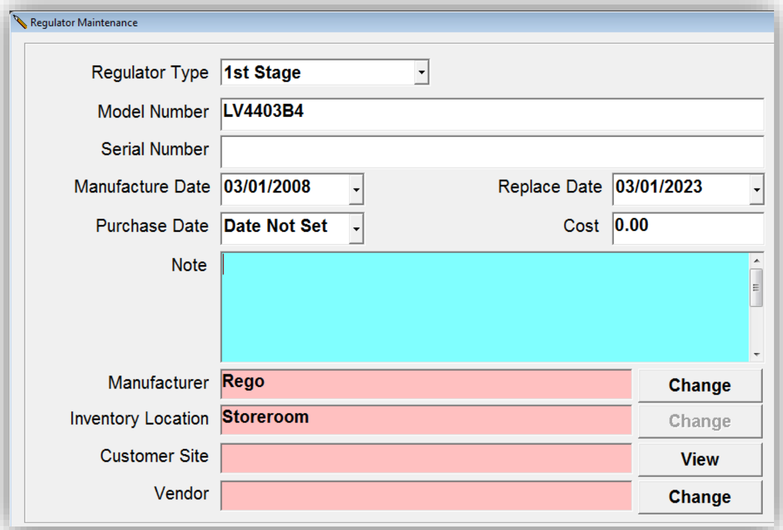
Click **"Edit Use"** to open the edit screen and check off each of the applicable uses. Optionally enter additional information into the Note section.



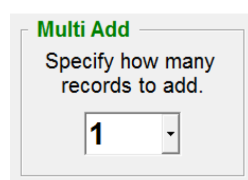
From the Reports menu, open the "Propane Uses" report. This wizard will let you filter the customer list by type of use. For example, quickly list all your accounts with a generator in an area impacted by a power-outage. You can also use this screen to list all your propane customers who do not yet have a Propane Use record defined. To accomplish this, first use the Fuel filter to only select customers who use propane. Next check the "Use Not Specified" box and then "Refresh List." You can edit the types of use from this screen by highlighting a customer record and clicking "View Use."

New Feature: Regulator Management

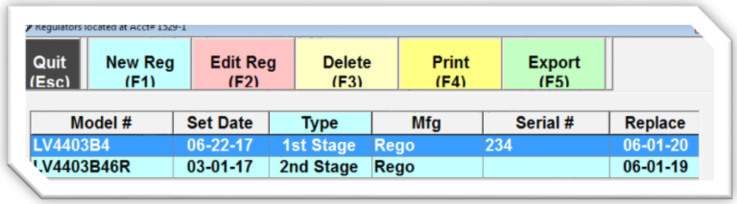
Choose "Regulators (F4)" from the Inventory menu to display the master list of your regulators. You can use the various filters to search for specific items located either in inventory or at customer sites. Use the criteria for "Replace Date" to show the regulators that need to be replaced by a certain date. Click "New (F2)" to add a new regulator record.



- Type is a required field. Example 1st or 2nd stage.
- Model Number is required.
- Serial Number is optional.
- Manufacture Date is optional but if entered the Replace Date will be automatically set to be 15 years later.
- Replace Date is required.
- Purchase Date & Cost are optional.
- Select the Manufacturer by clicking the "Change" button. If the company is not listed you can add it to the pick list. Select a Vendor in similar fashion although the vendor information is optional.
- Note the "**Multi-Add**" section. This controls how many regulator records will be added when you save. For example you might choose to multi-add 12 records of the same model when you receive a new shipment.

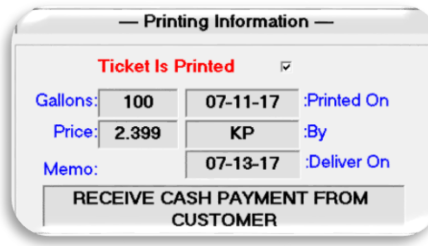


From a customer's dashboard screen, you can access the regulator information for this address by first clicking on the link to show propane tank details.



Miscellaneous Changes

1. The scheduled fuel screen now displays the information that was entered into the memo field when the last ticket was printed.



2. The Meter Ticket screen will now alert you if the account has an invalid price contract.

3. You can now print the service history for a customer from the Service menu by choosing "**Print History (F7)**"

4. New report: Job Information with Notes. Generate a listing of specific types of service calls for a period and see all the note information that was entered for each work order.

5. Previously if an order was not priced, "0.00" would print on the ticket in the price fields. Instead these sections will be now be blank, making it easier to hand-write price details. Note: you will only notice this if you utilize a custom ticket where the price is printed in a designated area.

6. It is now easier to request payment of an outstanding budget balance when a budget plan has ended. Simply click the box for "Request Bal when Plan Over" in the statement wizard.

7. The number of possible zones has been increased from 99 to 999.

8. Tank inventory report now shows the date a tank was set at a customer site.

9. You can no longer save a propane tank record with a duplicate serial number.

10. You can now delete an unwanted propane tank record.

11. If you prefer to print an invoice or receipt when saving the transaction, you can now choose to print on either Plain Paper or Wehof paper.

12. When printing a label for a user-specified address, the <Enter> key no longer prints the label. Instead <Enter> behaves like <Tab> and moves the cursor to the next edit box.

13. When you save a payment for an “Open Item” customer, you will be alerted if no invoices were selected to pay-off.

14. The bug associated with clearing a delivery date for a Saved Ticket has been corrected.

15. The bug associated with the Fuel Sales Profit report when filtering by T-group has been corrected.

16. The “**Combine 2 Duplicate Accounts**” tool available from the Customer Tools menu no longer requires a special password.

17. The bug associated with not being alerted about pending Auto-Post transactions if there were also pending Web requests has been corrected.

18. 2 new fields have been added to Custom Reports. DtAdded shows the date when the site record was added by a user. DtAnniversary shows the date when the customer started doing business with you.

19. The Authorize.Net interface complies with the PCI DSS requirement to disable TLS 1.1 and TLS 1.1.

20. The Authorize.Net and Linkpoint interfaces support the Mastercard 2 Series BIN numbers.