



*This document describes the various enhancements and modifications to DRM Windows that occurred between versions 10.2.280 and 10.2.288.*

### **New Customer Care Portal Feature – Request Service**

When this feature is turned on, your customers will be able to sign-in to their portal account and fill out a form to request service. You decide what types of service can be selected. For example, perhaps you may only want them to schedule an annual tune-up. The customer indicates their preferred days and times, along with their means of contact preference. Just like with fuel orders, new requests will automatically appear for review on your DRM-Windows Portal Manager screen. To approve the request, you match it up an appropriate work order job code and a new work order will be saved.

### **New Transaction Category: “Deposit”**

	Customer	Site
Balance	(\$263.82)	(\$263.82)
Regular	\$0.00	\$0.00
Budget	\$736.18	\$736.18
Prepay	\$0.00	\$0.00
F/A Bal	\$0.00	\$0.00
Deposit	(\$1,000.00)	(\$1,000.00)

The purpose of the Deposit category is to account for funds received on a customer’s account in the form of a deposit paid, and protect this money from being applied to other charges. For example, you receive a down payment for a new boiler and want to be sure the money doesn’t inadvertently get used to pay for some fuel charges. There are a couple of differences to note about this new category compared to the other 4 categories you are familiar with. It is recommended that you only utilize the

Deposit category from the credit screen. When it is time to apply the deposit to a charge, you should either simply re-categorize the deposit credit as “Regular” or perform a “Move Balance” action. Another difference is that the Deposit category is displayed on the customer’s dashboard **only when** there is deposit balance on the books.

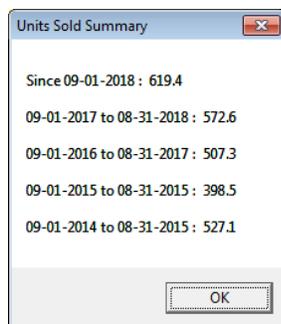
### **Enhancements to Auto Pay CC**

If a customer has given permission to always charge their card on file, the Auto Pay CC feature will automatically schedule a one-time payment to cover the invoice cost. Now you can choose to limit this to either or both Fuel or Service invoices. Instead of always charging the full invoiced amount there is now a preference to first apply an existing credit. Note that this preference needs to be first turned on from the “Utilities/Options” menu. Find the setting for “Posting/Credit Card – Apply Credit balance to Autopay Amt” and check the option for “Yes”.

## Enhancements to the Fuel Scheduling screen

Special Ticket Notes <input checked="" type="checkbox"/>	RETURN TICKET TO MAIL TO OWNER	
	NEED SMALL ADAPTER FOR DELIVERY	

A customer can have up to 4 scheduled fuels but up until now they all shared the same common delivery instructions that print on a ticket (which are edited in the Site Information screen.) Now you can control the printed message at the fuel level by checking the box for “Special Ticket Notes.” Note that when the box is not checked then the site instructions will continue to print by default.



Since 09-01-2018 : 619.4
09-01-2017 to 08-31-2018 : 572.6
09-01-2016 to 08-31-2017 : 507.3
09-01-2015 to 08-31-2015 : 398.5
09-01-2014 to 08-31-2015 : 527.1

Click on the “YTD” caption to see this summary breakdown of units sold for the past 5 heating seasons.

These fields are also available in Custom Reports and are named “UnitsYear1”, “UnitsYear2”, “UnitsYear3”, “UnitsYear4 “ and “UnitsYTD”

These groups are re-calculated every time you perform a year-end “Reset Units YTD” action.

## Miscellaneous Changes

1. If you use our Digital Dispatcher interface, you now have the ability to send orders directly to the Digital Dispatcher dashboard from the Meter Ticket screen.
2. **Fuel & Tax Summary By Day** is a new report showing daily sale and tax totals for each product category sold.
3. **Daily Receipts for Customers** is a new report to help you print receipts for credits posted on a particular day. It is very similar to how the Daily Invoices report can be used. It supports an optional filter to limit the transactions to just “Credit Card” payments.
4. The **Fuel Deliveries Total** report has a new feature called **Top N Records**. Select the option and then indicate the number of records to see. For example, first sort the list by “Total Units Sold” from highest to lowest. Now click “Top 10 Records” and enter 20. Refresh the list by clicking “Display List” and the list will display the 20 accounts who purchased the most fuel.
5. We now support tank reading data feeds from **Otodata** and **Droplet Fuel** tank monitors.
6. Previously, if an address contained a “#” to indicate a suite or apartment number after the street name, it often resulted in an inaccurate geocode. This issue has been resolved.



<b>Records Displayed</b>
<input type="radio"/> All Records
<input checked="" type="radio"/> Top N Records
# <input type="text" value="20"/>

7. The Fuel Inventory master list now supports filtering by product and location. For example you can specify all products assigned to a specific truck or show all trucks that can store a specific product.
8. You can now export your posting word and tax lists to Excel. The excel list shows all the various settings that are associated with each transaction code, such as which items are associated with specific tax codes.
9. When a customer has 2 or more scheduled fuels, you will now see a “Multiple Fuels” alert in the Fuel Scheduling screen.
10. The Batch Deposit report no longer includes any voided payments.
11. The “F/A Avail” amount displayed on the customer dashboard screen only appears if the customer has still has funds available in their fuel assistance allocation.
12. The Invoice Summary reports now support a transaction filter so you can limit the report to only invoices that contain specific line-items.
13. When a customer has multiple tanks at their location, all the tank serial numbers will print on a custom report as a comma separated list. Choose the field “PropaneSerialNums.”
14. The Parts list manager now supports advanced filtering for the Part Description and SKU fields. You can choose to look for items that either “Start With” or “Contain” the search word.
15. The Fuel Deliveries report now includes a column for the total related tax if applicable.
16. It is now easier to delete unwanted templates from the Letter-Writer app.
17. If you are using the preference to print Laser Envelopes from the main customer menu, you will now be prompted with the option to select a different printer.
18. It is now easier to correct a tank that was incorrectly flagged as a customer purchased one.
19. You can now complete 3 tax reporting related fields in the fuel maintenance screen –**State** associated with the tax, its **Schedule #** and **Product Code**. These fields are included in the **Fuel Delivery** report that is exported to excel.
20. The Open Invoice statements report is now sorted alphabetically by Site Name.