



This document describes the various enhancements and modifications to DRM Windows that occurred between versions 10.2.290 and 10.3.304.

New feature: Substituted Fuel Support

You may have customers that receive different products depending on the time of year and weather. For example, a customer may normally consume heating oil but perhaps needs kerosene or a blended mix during the bitter cold months. Up until now you would have been required to first change their scheduled fuel to the substitute before printing a ticket. If you did not do this, you would not see the Ticket Printed indicator or the order details on the customer's screen after the ticket was printed.

Now you have the ability to indicate up to two alternative or substitute products for each fuel. For example, edit the Fuel Maintenance record for "#2 OIL RES" and set the 1st Substitute to "Kero Res" and the 2nd to "Blend"

Alternative Fuels

Select up to 2 other fuels that may occasionally be delivered instead of this fuel.

| | | |
|----------------|-------------------|--------|
| Substitute #1: | 17. KERO RES | Change |
| Substitute #2: | 18. #2/KERO BLEND | Change |

If the customer is scheduled for #2 and you enter a new order, the default fuel selected will be #2 as expected. However, if you adjust the fuel to either Kero or Blend, you will be alerted that this is a substitute.

Schedule: Sub for #2 OIL RES

When you print the ticket, the customer's scheduling record will show that a ticket is out for Kero.

Ticket Is Printed

| | | | |
|----------|-------|----------|--------------------------------|
| Gallons: | 150 | 01-28-21 | Substituted by KERO RES |
| Price: | 2.899 | KP | |
| Memo: | | 01-28-21 | :Deliver On |

RECEIVE CHECK PAYMENT FROM CUSTOMER

| | | | | |
|--------------|-------|-----------|----------|------------------------------|
| Tank Size: | 2000 | Last Del: | 03-26-20 | (1) ... 1. #2 OIL RES |
| Water/Heat: | W | Next Del: | 04-17-20 | (2) ... N/A |
| Schd Method: | C | Cal Days: | 471 | (3) ... N/A |
| Discount: | ***** | | | (4) ... N/A |
| Price Calc: | | | | () Not a Scheduled Delivery |

It looks like this fuel may be a substitute for the scheduled fuel: #2 OIL RES

If this is correct press <Continue>, otherwise select 'Not a Scheduled Delivery'

Continue

When you enter the fuel invoice, the default fuel selected will be Kero and you will be prompted to acknowledge that it is indeed being used as an alternative to #2. Once you confirm this, the next delivery will be scheduled correctly.

Enhancement for Credit Transactions

You can now assign a default amount to a credit transaction.

For example, you have a promotion which discounts the fuel sale by 5 cents/gallon when a coupon is presented or mentioned, and you would like to track the usage and success of this campaign. Create a new Credit Posting Word called something like “COUPON .05G”. Enter an amount of .05 and check the “Is a Rate” box. The user will be prompted to enter the number of gallons when they post this coupon.

The image shows two side-by-side screenshots of the 'Credit Maintenance' window. The left window shows a configuration for a credit posting word with Sequence 13, Description 'COUPON .05G', and Amount .05. The 'Is A Rate' checkbox is checked. The right window shows a configuration for a credit posting word with Sequence 12, Description 'NEW ACCOUNT REFERRAL', and Amount 25.00. The 'Is A Rate' checkbox is unchecked.

Another example is a scenario where you want to credit a fixed amount for something like a \$25 certificate when a customer refers a friend. Create a new Posting Word called “NEW ACCOUNT REFERRAL” and set the amount to 25.00 but don’t check the “Is A Rate” box. When the user posts this transaction they will be able to enter a comment to reference the new account and the amount will be set to \$25.

New Report: Aged Balances for a Specific Date

You can now report on the composition of your A/R for any date in the past. Just like with the standard aging reports, the balances will be shown as current, over 30, 60 and 90 amounts. Total debits will be shown separately from total credits on the summary page. You can elect to show the account details on the report or just show the summary page.

New Feature: Automatic Removal of Credit Hold Status

A ticket will not print for any account that has been placed on credit hold until the credit manager first clears the hold. You can now schedule this to happen automatically once the account’s balance reaches the desired minimum amount. *Note that this only works for your customers scheduled for automatic delivery.*

First, edit the Posting option: “**Posting/Credit Hold – Minimum Balance for Auto Cancel**” and assign the minimum balance. The default is \$0.00 but perhaps a small balance is also OK.

Next, turn on this feature by editing the option for “**Posting/Credit Hold – Allow Auto Cancel**”.

At the time when a batch is posted, the balances for any automatic accounts currently on credit hold will be examined and, if their balance is now satisfactory, the credit hold status will be removed. An audit record is saved to help document this event and can be reported later.

New Feature: Save Deposit-able Transactions to the same Batch

This new behavior is similar to how Credit Card payment transactions are saved. Deposit-able transactions are payments received that would later be deposited in the bank. Instead of these transactions being saved to each user's personal working batch along with their other work, they can be saved to a dedicated batch shared by other users also posting transactions. The advantage to the consolidated approach is that it would later simplify printing a deposit slip for the bank's deposit.

To start using this feature, first create a new user record that will own the deposit transaction batches (something like "DEP" or "BANK" might be useful). Since this will not be an active DRM user, be sure to uncheck their "Active User" box.

Next, you need to configure DRM to save deposit transactions to this user's batch. Locate and edit the Posting category option called "**Depositible Credits – Save to this user's batch**". Enter the username you created in the previous step and save the record.

Finally, in order for any other users to begin utilizing this new configuration, they will first need to log out of DRM and then back in.

New Report: Unpaid Invoices

Specify Criteria for Fuel Delivery Report

| Date | Acct. # | Bill Name | City | RBFP | Tran # | Category | Ref # | Total | Payments | Balance | Age | Type | TG |
|----------|---------|-------------|---------|------|--------|----------|-------|--------|----------|---------|-----|------|----|
| 03-22-20 | 37-1 | BATES MOTEL | CHATHAM | R | 101406 | FUEL | 1065 | 84.56 | 31.01 | 53.55 | 317 | OI | 0 |
| 04-04-20 | 37-1 | BATES MOTEL | CHATHAM | R | 101408 | FUEL | 1394 | 164.27 | | 164.27 | 304 | OI | 0 |

This report provides visibility into invoices that have not yet been entirely paid-off. The various filters and switches provide control over the generated report.

- Invoice Age – only include invoices that are at least this many days old.
- Remaining Balance – only include invoices with this minimum amount due.
- Bill Type – choose between Open Item and Balance Forward accounts.
- Categories – choose between Fuel, Finance Charge or Other Charges.
- Transactions – filter on specific transactions.

You can choose to print the report, export it to excel, or add the customers listed to your Quick Pick List.

New Feature: Consolidated AutoPost Invoices

It can be convenient to use the **AutoPost** feature to schedule recurring invoices such as Annual Service Contracts or Tank Rental fees. However, there are occasions where you may want to invoice for extra surcharges in addition to the base contract, such as charges for extra zones or multiple units. Previously, AutoPost would have generated a separate invoice for each specific line-item. Now you can elect to combine them all into a single invoice for each customer.

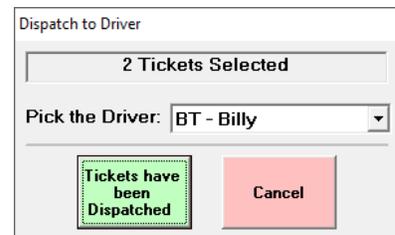
To turn this feature on, edit the Posting option called “**Consolidate Multiple AutoPost Invoices**”.

Note: the AutoPost transactions have to share the same renewal date in order for them to be consolidated.

New Feature: Dispatching a Ticket

Sometimes orders come in for same-day delivery, in which case there’s generally no need to print a ticket. Instead, save the ticket as normal, and then from the Saved Tickets board, select the appropriate ticket(s) and choose “Dispatch to Driver” from the menu.

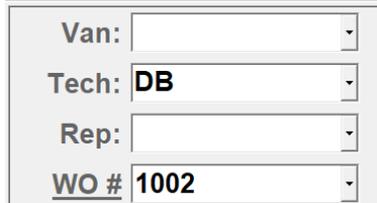
Pick the Driver and click “Tickets have been Dispatched”.



It will still appear as though there is a printed ticket out for the customer but opening the Scheduled Fuel screen will reveal that it was dispatched.

Dispatched to BT / Pre-Paid Online

Enhancement to Service Invoice



You can now update a work-order directly from the invoice screen.

First, select the relevant work order from the dropdown next to WO #.

A line appears below WO #, indicating a hyperlink. Click it to open the work order screen. Upon exiting the work order screen you can pick up where you left off on the invoice.

Miscellaneous Changes

1. The **Aging - Total Balances** report now includes a summary section on the last page that shows the total Credits compared to the total Debits. If you only want to print this summary page without showing the supporting account information, remove the check from the “Show Account Details” checkbox.
2. The **Upcoming AutoPost Transactions** report has some new filters to limit the report to certain transactions or customers. The report now can also be exported to excel and the selected customers can be added to your active Quick Pick list.

3. **Labels (Current Resident)** is a new report for printing mailing address labels for a group of selected accounts. The phrase “**Current Resident**” prints in place of the account name. This will be useful if you launch a mailing campaign for addresses you have previously serviced but not sure of the current tenant.
4. The **Scheduled Fuel Information** report now indicates whether a ticket is printed. You can use the wizard to filter on this.
5. The **Tickets Printed** & **Delivery Statistics** reports can now be exported to Excel.
6. The Scheduled Fuel screen will indicate if a ticket has been assigned to a delivery route.
7. The Reference Number field on an invoice can now contain up to 12 characters.
8. As you prepare to exit the Degree Day screen, the system will alert you if there are currently any automatic accounts, *without a printed ticket*, due for a delivery by today. Note that this feature can be turned off if you prefer to not see this notification.
9. A valid budget plan now requires a starting month and year instead of just a month.
10. **Fuel Prices by Zip Code** is a new report that shows your fuel prices specific to each active zip code you have defined. This will be a useful audit report if you allow **Guest Ordering** from your **Customer Care Portal**.
11. Previously, when you adjusted a k-factor in the Fuel Scheduling screen, the next delivery date would be re-calculated for all three seasons. Now this only occurs for the season that was actually adjusted.
12. We now support automated daily tank level readings sent by **Beckett Tank Monitors** and can use this information to adjust a customer’s delivery schedule.
13. The size of a **Ticket Group** code has been increased from a maximum of 4 characters to 5.
14. Previously, if a budget customer’s fuel invoice was entered after their price contract had expired, the transaction was reclassified from Budget to Regular. This no longer happens.
15. There is now an option to print the **Last Burner Clean Date** on your meter ticket.
16. The **Fuel Sales Profit** report can now be exported to excel.
17. You can now have more than 32,768 payment profiles stored in your **Authorize.Net** vault.
18. The issue where the **Fuel Assistance Available** amount displayed on the customer dashboard was sometimes hard to read due to the color contrast has been fixed.