

*This document describes the various enhancements and modifications to DRM Windows that occurred between versions 10.3.308 and 11.1.400.*

### **Enhancement to Authorize.Net**

The “Authorize.Net” app has been reconstructed from the ground up, providing a new look and feel, more features and the potential to possibly reduce your credit card processing fees.

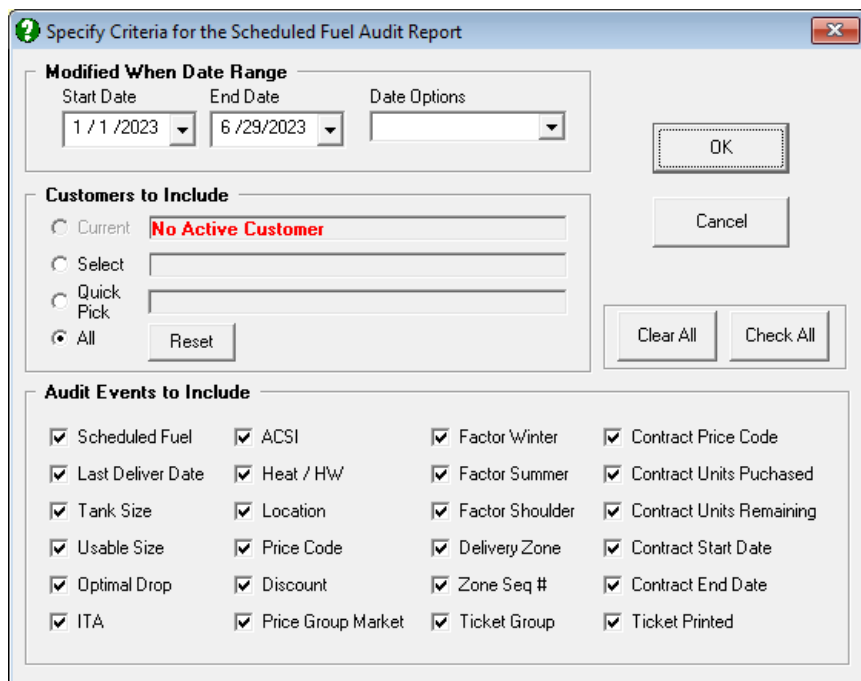
- You can now process **ACH** (eCheck) payments directly from within DRM Windows or schedule them to occur as AutoPost transactions. Note that the eCheck feature must first be enabled for your authorize.net account.
- You can now process a **Void** or **Refund** for a payment that was submitted via the **Customer Care Portal**.
- You can now have multiple outstanding **Authorizations** for an account and the control over which ones to capture or void.
- You can now use multiple merchant accounts. Depending on your processor, this has the potential to lower your processing fees considerably. You can have a separate merchant account for each type of credit card you accept. Check with your processor to see if this can be beneficial to you.

### **Enhancement to Scheduled Fuel Auditing**

Mistakes happen and sometimes data is changed unintentionally. By keeping track of changes to key fields, you can later piece together a picture of what happened.

The “Scheduled Fuel Information Audit” report can be used to show a history of what changes have occurred to an account’s scheduled fuel.

Use the wizard to focus on specific fields such as K-Factor or Price Code changes. Pick an interval over when changes may have occurred. Use the Customer picker to identify the accounts that you wish to examine. The report will display how the selected fields were changed over the interval.



**Specify Criteria for the Scheduled Fuel Audit Report**

**Modified When Date Range**  
 Start Date: 1 / 1 / 2023    End Date: 6 / 29 / 2023    Date Options: [v]  
 [OK]

**Customers to Include**  
 Current: **No Active Customer**  
 Select: [v]  
 Quick Pick: [v]  
 All: [Reset]    [Clear All]    [Check All]  
 [Cancel]

**Audit Events to Include**

<input checked="" type="checkbox"/> Scheduled Fuel	<input checked="" type="checkbox"/> ACSI	<input checked="" type="checkbox"/> Factor Winter	<input checked="" type="checkbox"/> Contract Price Code
<input checked="" type="checkbox"/> Last Deliver Date	<input checked="" type="checkbox"/> Heat / HW	<input checked="" type="checkbox"/> Factor Summer	<input checked="" type="checkbox"/> Contract Units Purchased
<input checked="" type="checkbox"/> Tank Size	<input checked="" type="checkbox"/> Location	<input checked="" type="checkbox"/> Factor Shoulder	<input checked="" type="checkbox"/> Contract Units Remaining
<input checked="" type="checkbox"/> Usable Size	<input checked="" type="checkbox"/> Price Code	<input checked="" type="checkbox"/> Delivery Zone	<input checked="" type="checkbox"/> Contract Start Date
<input checked="" type="checkbox"/> Optimal Drop	<input checked="" type="checkbox"/> Discount	<input checked="" type="checkbox"/> Zone Seq #	<input checked="" type="checkbox"/> Contract End Date
<input checked="" type="checkbox"/> ITA	<input checked="" type="checkbox"/> Price Group Market	<input checked="" type="checkbox"/> Ticket Group	<input checked="" type="checkbox"/> Ticket Printed

## **Enhancement to Switching Season**

By making use of the 3 supported seasons (Winter, Summer, and Shoulder) you can adjust the frequency with which you deliver fuel throughout the course of the year. For example, during the cold winter months, a home heating oil account may have a consistent 4.5 K-Factor burn-rate but during the summer they are just using fuel for hot water at around 3 gallons/week. When you switch season, you are setting the active burn-rate to match what has been established for the new season. Although this is helpful to a degree (no pun intended), it was historically not a perfect solution, as the conversion did not take into consideration how much fuel was needed prior to the switch.

This new enhancement does take into consideration how much fuel is needed prior to switching season and uses this information in conjunction with the new season's burn rate to more accurately forecast the next delivery.

For example, summer is winding down, the nights are getting longer and colder and the heat is turning on for a few hours. It's time to switch from Summer to Shoulder season. However, the account has about 2/3 tank and needs about 90 gallons. After you switch, the tank still needs 90 gallons and will just be burning fuel a bit faster going forward.

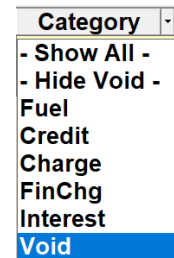
## **New report: Transactions that were Deleted**


Every time a transaction is deleted, a record is kept summarizing the original transaction along with details of when it was deleted and by whom. You can use the report wizard to filter on a variety of data points such as transaction categories, original posted date, delete date, etc. The list can be printed or exported to excel. Double-click on a record to display the Cust Info Popup screen.

## **New Feature: (drumroll...) Undo Void**

If you void a transaction by mistake, you can now undo the void and restore the transaction to its original state, as long as the batch containing the voiding transaction has not been posted.

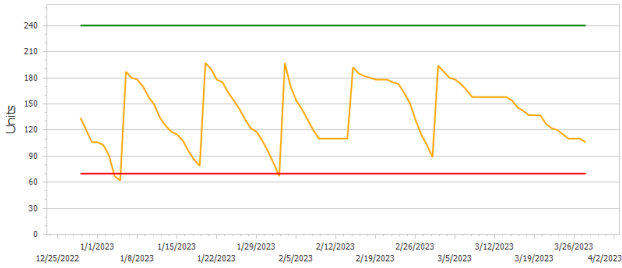
First, locate the voided transaction. From the View Transaction screen, click on the Category filter and select Void. Now you are seeing all the transactions that have been voided for this account. Notice how they are listed in pairs: the original transaction followed by the voiding or reversing transaction. They will both share the same date and reference number, but the original transaction will have a lower **Tran #**. Select the original transaction and choose "**View (F2)**" to open the viewer.



Click the  button and confirm your decision. The original transaction will be restored and the voiding transaction will be deleted.

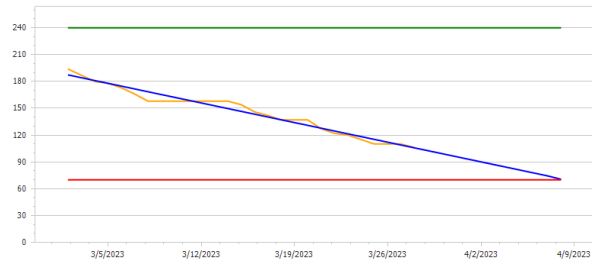
Note: because the voiding transaction is deleted it will reported by the "Transactions that were deleted" report (see previous section), allowing you to audit voids that were reversed.

## Enhancements to Tank Monitoring



Click “**Monitor Info**” to display the usage history for the selected tank.

Click “**Estimate**” to show the estimated date for both the next optimal delivery and the runout date. The estimate is calculated from a linear regression analysis of the usage curve since the last fill up. Note that this calculation can also be extended to how the forecasted scheduled delivery is calculated. Call us if you would like to switch to this method.

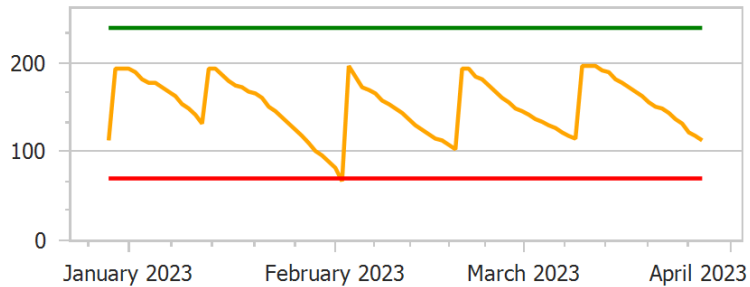


There is a new report style available that will print the usage history for all of the selected tanks.

Monitor # [REDACTED]

Account #: 17185-1

[REDACTED]  
Portland Rd  
Arundel  
% Full: 47%  
Units Needed: 127

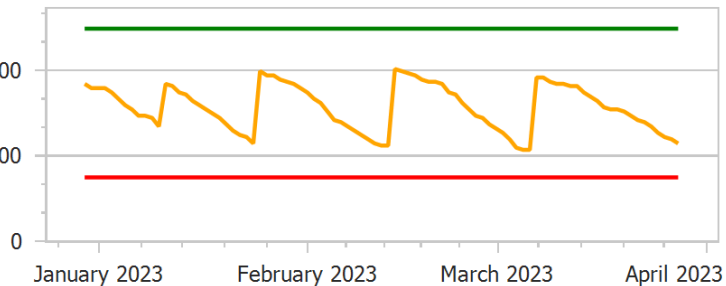


— Capacity  
— Actual  
— Reserve

Monitor # TAJ7P [REDACTED]

Account #: 16926-1

[REDACTED]  
Roosevelt Trl  
Raymond  
% Full: 46%  
Units Needed: 270



— Capacity  
— Actual  
— Reserve

## Enhancement to Invoice Payoff Manager

When you need more control over how payments are applied to specific invoices, choose “**Payoff Invoices**” from the menu after you have entered a payment in the credit screen.

You can click the invoice to pay off in the grid and edit the amount to apply. Alternatively, you can search for the invoice by typing in either the “**Invoice #**” or the “**Reference #**”.

You can print a screenshot by clicking the “**Print**” button.

**Credit Information**

Total Credit Amount	Assigned Amount	Remaining / Unassigned	Print	Close (Esc)
\$442.44	\$138.20	\$304.24		

**Select Invoice to Payoff**

Invoice #	Reference #	Amount to Apply	Clear Credit	Apply Credit
104163	10245	304.24		

Date	Inv #	Ref #	Inv Total	Other Pymts	Pay This	Applied	Balance	Manual
02-16-22	101395	5155	\$138.20	\$0.00	<input checked="" type="checkbox"/>	\$138.20	\$0.00	<input checked="" type="checkbox"/>
03-22-22	101406	1065	\$84.56	\$0.00	<input type="checkbox"/>	\$0.00	\$84.56	<input type="checkbox"/>
04-18-22	104163	10245	\$304.24	\$0.00	<input checked="" type="checkbox"/>	\$0.00	\$304.24	<input checked="" type="checkbox"/>
04-18-22	104166	104163	\$570.29	\$0.00	<input type="checkbox"/>	\$0.00	\$570.29	<input type="checkbox"/>

## Enhancement to the Site Location Viewer – “Show Neighbors”

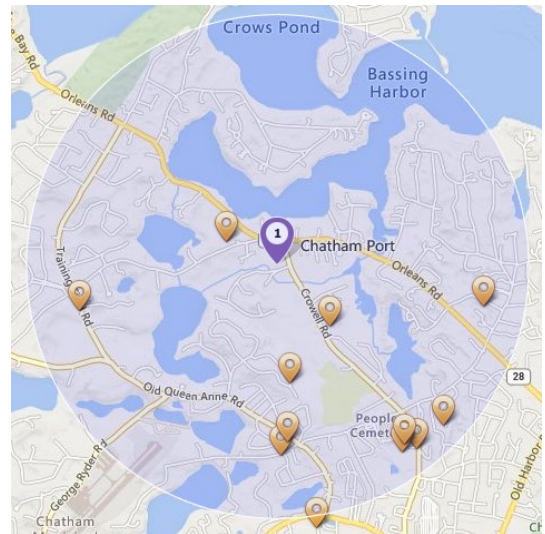
From the Site Info screen click “**View**” to display its location on the map based upon the account’s geocoded information. Click “**Show Neighbors**” on the menu to display this prompt.

Show Neighbors

Near By Closest Options

Show neighbors within proximity of:  Mile

OK  Cancel



- **Nearby Option:** Edit the distance and click OK to display a pin for each customer located within this range as the crow flies. Hover over each pin to display the name and address of the account. Right-click to open the Cust Info Popup screen.
- **Closest Option:** Indicate the number of accounts to display (up to 99) and click OK.
- **Options:**
  - Adjust the icon used to indicate a neighbor.
  - Show only Automatic or Will Call accounts.
  - Add the selected neighbors to your active Quick Pick list.

## **Enhancements to the Proposal Builder**

There are 2 new document layout styles to choose from that don't show any of the details from the estimate section and instead just shows the total cost for the quote along with the specification and notes.

If you have a type of job that you quote frequently, and it typically includes the same parts and specifications, then you can "**Clone**" it, and later start a new proposal based off the clone. Open such a proposal that you have previously saved and choose "**Save Clone**" from the menu. You will be prompted to enter a name for the clone to help you select it later. Each of the items from the estimate section along with the specifications, notes and payment terms will be saved with the clone. When you create a new proposal, you can choose "**Import Clone**" from the menu and pick the appropriate job. You can then adjust any of the imported details as necessary.

After a proposal has been accepted you can generate a new order for the parts referenced in the estimate by choosing "**Order Parts**" from the menu.

"**Printing / Proposal – Authorized Signature**" is a new option. Enter a name and it will print in 14-pt cursive font on the Proposal document.

## **New report: Month End Summary**

Every time the "**Month End**" process runs, a record is kept of which steps and parameters were selected. For example, it will show what date was selected for "Aging", how much revenue was generated from Finance Charging and how many Auto Post errors such as credit card declines occurred.

The report can be filtered using multiple criteria and then printed or exported to excel.

To see more details on the AutoPost Errors click the "**Show AutoPost Errors**" button.

## **Enhancement for Directions to Account Address**

Previously, every user shared a common location from which directions to a customer's address were based. Now, each user can override the default location with their own preference. Edit these values within the section of "**My Preference Options**."

<b>Map Starting Location - City</b>	<b>North Chatham</b>
<b>Map Starting Location - State/Province</b>	<b>MA</b>
<b>Map Starting Location - Street</b>	<b>293 Orleans Rd</b>
<b>Map Starting Location - Use My Preferences</b>	<b>Yes</b>
<b>Map Starting Location - Zip/Postal Code</b>	<b>02650</b>

Set the "**Use My Preference**" option to Yes and your location will be used as the starting address.

## **New Feature: Merge Duplicate Parts**

If you discover a duplicate part in your inventory, you can simply delete it, as long as there are no sales or purchase transactions for it. Instead of deleting the duplicate you can choose to merge it with the part you wish to keep. Start with the Part you want to keep and click “**Duplicate Part Wizard**” from the Actions tab.

— This the Part to Keep —		— This the Part to Replace —	
Part #	1071	Part #	Pick Part ...
Description	NB 70D 1.25 NOZ	Description	
SKU	NOZ B SLD CONE 70D 1.25	SKU	
Location	WAREHOUSE	Location	
QOH	0	QOH	

Perform Merge      Close

Click “**Pick Part**” and select the part you want to replace and then click “**Perform Merge**.” Confirm that you wish to proceed. Any inventory transactions or sales that were linked to the duplicate part will be linked to the retained part and the duplicate part will be deleted.

## **New Feature: Note Category Security**

Previously, if a user had access to “**Daily Work**” they would see all the notes ever saved to an account’s profile. Now, you can control which “**Note Categories**” are accessible on a per user basis. For example, say “TOP SECRET” is a note category that should only be accessible by the office manager. Edit this Note Category and check the “Sensitive Material” box. Now click “**Edit Access**” and indicate which active users should not have access to this category. When those users pull up a customer record, any notes categorized as “TOP SECRET” will be hidden from view.

## **Miscellaneous Changes**

1. There is a new button next to the “**Delivery Date**” field on the **Meter Ticket** screen. Click it to display a calendar from which you can select the scheduled date.
2. If an account has a Service Contract renewal scheduled to **AutoPost**, and the account is also set up for **AutoPay Service**, the invoice that is created when AutoPost is run will trigger the generation of the special one-time payment record.
3. The “**Route Stops – Style 1**” report now prints the last **Tank Level %** reading in the right margin if the tank is linked to a tank monitor.
4. The “**Fuel Delivery Report**” wizard has a new column indicating whether the tank was full after the delivery. You can filter on **Full**, **Not Full** or both. The printed report will show a plus (+) next to the units delivered when the tank was not filled.

5. The “**Budget Information Report**” wizard has two new filter options in the Additional Criteria section.
  - RBFP=B Accounts Only
  - No Payment in Last 30 Days
6. If an account has multiple systems defined in the **Service Information** section, you can now filter by a specific unit and print the service history for that unit.
7. When you record an **Inventory Purchase or Transfer** action, you can now reference the person involved.
8. The new option “**Printing – Meter Ticket Format for Delivery Date**” provides more control of how the delivery date is printed on a ticket. The default value is “**mm-dd-yy**” which would print as “**06-15-23**”. “**ddd mmm-dd**” would print as “**Tue Jun-15**”. Please call us if there are other formats you would like to see.
9. **Propane Tank** maintenance now supports **Anode Testing**. Specify the date of the last anode test and the next scheduled test date will be set to 3 years later. You can print a list of all tests that are due by a specific date.
10. When a **Guest Order** that originated from the **Customer Care Portal** is approved, the new account that is automatically created will now use the value for your default **Terms**.
11. Previously if you wanted to Delete or Void an invoice that was linked to a **Manual** assigned payment, you first had to clear the payment. This step is no longer necessary.
12. The **Saved Ticket** list now includes a column for **T-Group** which you can filter on.
13. There was a bug in the **Fuel Tax Summary by Day** report which displayed an incorrect number for the taxed fuels count summary. This has been corrected.
14. When you are editing a **Service Invoice** you can no longer open the link for the assigned work order until you exit line-entry mode.
15. A new field “**SchedFuelsCSV**” has been added to the list of **Custom Report** fields. It will display a comma separated list of all the fuel numbers scheduled for an account. For example, if a customer is scheduled to receive 3 fuels: #2, #10 and #16 it would print as “2, 10, 16”. Tip: if you only want to report customers with multiple scheduled fuels, add a criteria filter for “**SchedFuelCount > 1**”
16. If you have a **Scheduled Service** record for a billable item such as a Service Contract or Tank Rental Fee, you can create an AutoPost record to schedule the generation of the invoice by clicking the “**Schedule for AutoPost**” button.
17. There was a bug in the Scheduled Fuel maintenance screen where the system did not recognize if you made a change to the Zone by typing instead of picking from a list. This has been corrected.
18. The “**System Information**” screen lets you document the installed equipment and components. You can now copy this information to a different account by choosing “**Copy to Site**” from the menu and you will be prompted to pick the new account. This should be a useful feature when a property is sold and you open a new account for the new owner.

19. When an account is set up for **AutoPay**, a one-time Auto-Post record is scheduled when you save a new invoice. If that invoice is subsequently edited to \$0.00 then the Auto-Post record is automatically deleted.
20. If a **Saved Ticket** has been assigned to a **Delivery Route**, you can see which route when you open the **Scheduled Fuel** screen.
21. If you have been using the Substituted Fuel feature (that helps you manage delivering alternative fuels like kerosene in winter instead of #2 fuel) you may have noticed a small bug where the delivery history does not print on the ticket. This has been corrected.
22. The **Credit Card Authorizations** report will now print a “P” in the right-side margin to indicate that the customer has a **Printed Ticket** or “S” to indicate a **Saved Ticket**.
23. There was bug with a **Budget Statement** where a budget plan was sometimes flagged as over before the final budget payment was requested. This has been corrected.
24. The **Delivery Totals By Month** reports now let you filter by specific months.
25. Previously, the “**Transactions by Driver**” report required that the invoices belong to a batch. Now the report will also include floating transactions.
26. If you do not wish to print the **Due Date** for the next **Budget Payment** on a statement, set the value for the option “**Default Budget Payment Due on**” to **Zero**.
27. You may be familiar with how you can edit the color scheme for each of the Account Type codes. You can now take the same approach with the **Billing Cycle** and **Account Status** codes.
28. There was a bug in the **Fuel Deliveries** report where you could not filter by the **Optimal Drop**. This has been corrected.
29. **Aging – Total Balances (120 day)** is a new report that includes a new fifth aging column showing a balance over 120 days.
30. When the **Meter Ticket** screen is first opened, the display panel for one of the 4 options: “**Fuel Info**”, “**Tax Info**”, “**Delivery Info**” or “**Price Info**” is shown. The default panel is determined from the last ticket you entered. However, there is a new option called “**Meter Ticket Screen – Default to Fuel Info Panel**” which will force the default panel to always show “Fuel Info”.
31. There was a bug in the **Scheduled Fuel** maintenance screen that reported an incorrect estimate for today’s Needed fuel when Shoulder season was active. This has been corrected.
32. **Avery Labels #5162** (1-1/3” x 4”) can now be printed.
33. “**Route Stops – Style 8**” is a new condensed Delivery Route report. Only name, address, current balance and last delivery date are printed. If you would like to set this as your default report, edit the option for “Printing / Default Delivery Route Report #” and set the value to 8.
34. The **Tank Monitor Id** (listed as **MonitorId**) has been added to the list of available Custom Report fields.



35. There was a bug in the “**A/R Balances by Date**” report where amounts classified as “**Deposit**” were not included in the Total Amount. This has been corrected.
36. You will be reminded if an account is set up for “**AutoPay**” when you enter a new invoice.
37. The **Average Unit Price** that appears in the footer of the **Fuel Deliveries** report now refers to the **Weighted Average Price** which takes into consideration the number of units sold.
38. The **Scheduled Service Information** report includes a new filter for the **Note**. Type in part of the note you wish to search for and then click Refresh to apply the filter.
39. There was a bug with **LetterWriter** where the **Contracted Units Purchased** field would print with a dollar sign. This has been corrected.
40. You can now initiate a **Credit Card Return** for a transaction that was posted in the previous Fiscal Year without first having to adjust the Fiscal Year Start date.
41. The “**Will Call List**” within the Delivery Route module is a useful tool for identifying Will Call accounts who may be due for a delivery in a particular area or zone. After you have built a list that you want to work with you can choose “**Add QuickPick**” from the menu to add each of the accounts to your active Quick Pick list.
42. Previously if you **Saved** a **Ticket** for an unscheduled fuel and then attempted to edit it the Zone was displayed as “2755”. This bug has been corrected!
43. The bug where Inventory reports were mixed in with regular Custom Reports has been corrected.
44. The “**Transaction Finder**” report wizard now allows you to search for credit card transactions based on the last 4 digits of the card that was used. Also, you now can filter on a particular type of transaction.
45. The bug with the date format when “**Exporting Journal Entries to QuickBooks**” has been corrected.
46. You can now enter dashes into the “**FEIN**” field in the Billing Info screen.
47. “**Fuel Deliveries Summary By Year**” is a new report that allows you to complete fuel sales over several years. Each of your fuel products is reported and you will see a column for each year within the selected date range showing the total fuel sales and number of customer serviced.
48. “**Add To QuickPick**” option has been added to the “**Transaction Finder**” wizard.
49. You can now filter by **Technician** in the “**Part Sales**” report wizard. For example you can quickly report all the parts used by a specific technician over the course of the specified period.