

This document describes the various enhancements and modifications to DRM Windows that occurred between versions 11.1.410 and 11.2.412.

New Feature: Document Manager (Docman)







Very similar to how easy it is to add notes to your DRM accounts, *Docman* lets you attach a variety of documents to each account. You can then search for and review these documents from any DRM workstation or from within your Customer Care Portal account.

Documents can range from digitized paperwork for Prebuy Contracts or Lease Agreements, to photos of Tank Inspections or Service Work, etc.

The documents are stored securely in the cloud and because of this you can even share some of these documents with your customers and they will be able to view them when logged into their Portal account.

Acct # 27 TONY MONTANA 135 A OLD WESTFORD RD CHELMSFORD MA 01824	Auto	25 Docs	Customer
		Balance	(\$1,643.47)
		Regular	(\$1,643.47)
	1 Tank	Budget	\$0.00

After you have selected a customer, you can easily determine if they have any saved documents. In the above example, the account has 25. Click the number to see the list of all their files. Right-click on any document to see the list of options.

-  View Document
-  Edit Document Tags
-  Upload New Documents
-  Download
-  Refresh List
-  Tag Manager

- Front Of House**
- Furnace**
- Lease Agreement**
- Oil Tank**
- Propane Tank**

Tags are very similar to the hashtags you pin to your DRM accounts, but these tags are used specifically to help categorize documents. There is no limit to how many tags you can create, and you can associate up to 25 tags with each document.

From your Portal Manager screen you can see a list of all documents across all accounts. You can then use the tag filter to focus on a specific category.

You can add a document (such as a copy of the meter ticket) from within the Invoice screen. We call this an attachment, and it is linked directly to that invoice, in addition to being linked to the account. Within the Transaction History screen, there will be a checkmark to indicate that an invoice has some attachments, similar to how you can tell if an invoice has notes.

If you elect to email a copy of the invoice to the customer, you will have the option to also include the attachment. This option is only available if there are attachments linked to the invoice.

A Document has been Linked to this Invoice. Include it as an Attachment

Document Manager falls within the DRM Cloud Services platform and a subscription is required to use this service. A Customer Care Portal subscription is not required but there are generous discounts available if you bundle Docman with a Portal. As with all our subscription, you can elect to pay monthly or save 15% by pre-paying for a year.

If you're interested in seeing how all this works and integrates seamlessly with your DRM Windows, give us a call and we'll walk you through all the various scenarios. Imagine the benefits of no longer needing to search through dusty bankers' boxes for copies of old tickets and contracts!

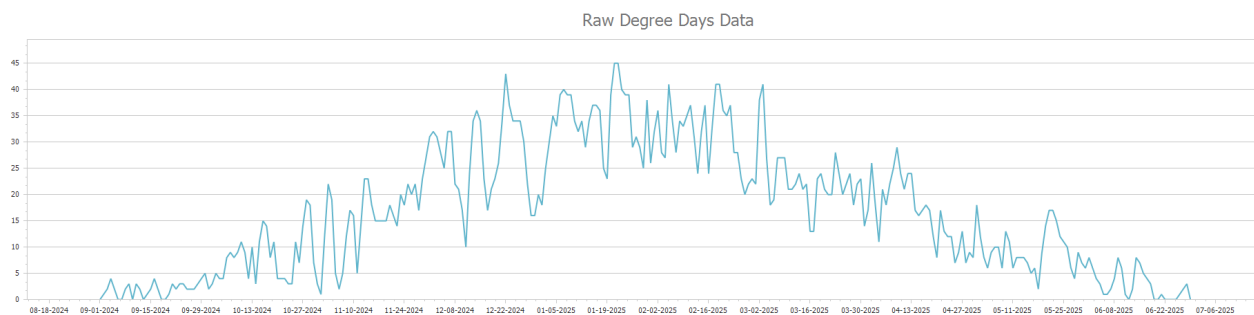
New Feature: Integration with Degree Days.net

Degree Days.net is an online service that receives temperature data from thousands of weather stations and produces detailed degree day data daily. By using our new interface, degree days can be imported directly into DRM, saving you the step of manually entering the data and helping eliminate potential errors. Since Johnson Degree Day Systems is no longer operating, this approach could be a viable option for you.

A subscription to their service is required and the cost depends on how many locations you receive data for. You purchase the subscription plan directly from Degree Days.net (there are no extra DRM costs involved) and you can learn more about their pricing here: <https://www.degree-days.net/api/signup>

DRM will allow you to track up to 6 weather stations and there are several options on how to process the data if you are tracking more than one station. One of your stations is designated as the default station and you can choose to import the degree days into DRM just for this station. Alternatively, you can choose to import the average degree days reported for all your stations, or import the degree days for the coldest location each day.

You have the option to download historical degree day information for each station and there are several reports available in DRM for comparing degree days across locations by month and year.



Enhancement to Degree Days

The Degree Day screen has a new look and feel, and also provides several new capabilities. You can now delete a record that was added by mistake by right-clicking on the row and selecting "Delete Entry". You can also right-click on a record and choose "Show Details" to discover when the entry was added and by whom, or from which weather station did the reading originate if using the new automated feed feature. Select "Export F4" from the menu to export the current season's degree day records to a new Excel worksheet. When it is time to change the season, click on "Settings".

As you leave the Degree Day screen you are used to being alerted if there are automatic accounts due for delivery without a printed ticket. You will also be alerted if any of these accounts are on Credit Hold.

New Portal Feature: Contact Us

You can now offer your Portal users a convenient way to submit a low-priority request to your office. For example, perhaps they want to share a new phone number or email address. These requests are automatically downloaded to DRM and your staff will be alerted to new ones. The person processing the request can document their response and it will be saved as a note on the account.

New Report: Invoice Payoff Detail

This report provides insight into how long it took for specific invoices to be paid in full. For example, use the filters to identify invoices that took longer than 30 days, or perhaps focus only on invoices over a certain amount.

New Report: Invoice Payoff Summary

This report helps identify customers who are good payers or vice versa. The report will show a summary for every account that was invoiced over the specified timeline.

- **Min Days** is the shortest time it took to pay an invoice. A negative number indicates it was paid in advance.
- **Max Days** is the longest time it took to pay an invoice.
- **Avg Days** is how many days on average it takes to pay off invoices.
- **Median Days** is the median time it takes to pay off invoices.

You can use the filters to help distinguish between Fuel and Service invoices or perhaps identify accounts who are habitually slow to pay

Enhancement to Tank Monitoring

Last Read	Gals	% Full	TKT	Status	Product	Last Delv	Zone
=	=	=	Ⓜ Ⓟ Ⓢ Ⓣ	Ⓜ Ⓟ Ⓢ Ⓣ	Ⓜ Ⓟ Ⓢ Ⓣ	=	Ⓜ Ⓟ Ⓢ Ⓣ
6/26/2025 8:57:00 PM	155	<div style="width: 47%;">47</div>		VALID	2. PROPANE RES	3/26/2025	H2
6/26/2025 5:30:00 PM	65	<div style="width: 13%;">13</div>		VALID	2. PROPANE RES	3/5/2025	H1
6/27/2025 10:54:00 AM	365	<div style="width: 73%;">73</div>		VALID	2. PROPANE RES	4/3/2025	B1
6/26/2025 5:18:00 PM	250	<div style="width: 25%;">25</div>	Y	VALID	2. PROPANE RES	5/6/2025	B1
6/26/2025 2:11:00 PM	590	<div style="width: 59%;">59</div>		VALID	2. PROPANE RES	5/6/2025	B1
6/27/2025 1:42:00 AM	681	<div style="width: 68%;">68</div>		VALID	2. PROPANE RES	4/7/2025	B1
6/26/2025 10:42:00 AM	711	<div style="width: 71%;">71</div>		VALID	2. PROPANE RES	5/6/2025	B1
6/26/2025 8:08:00 PM	350	<div style="width: 35%;">35</div>	Y	VALID	2. PROPANE RES	5/6/2025	B1

The column displaying the last reported level now has an embedded fuel gauge, so you can see at a glance how full each tank is. To the right of this, you will see a “Y” if a ticket has already been printed for this account. Right-click on a record and you will see an option to “**Add a Ticket to a Route**”. Note that this only applies to accounts on an Automatic or Keep-Full schedule.

Enhancement to Account Lookup

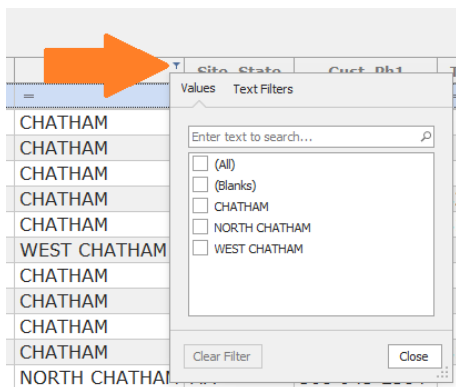
If you are familiar with Custom Reports, you will see many similarities with how the new lookup screen works.

Acct Site Num	Cust Last First	Site Last First	Site Addr1	Site City	Site State	Cust Ph1	Total Due
37-1	BATES MOTEL	BATES, NORMAN	352 MAIN ST	CHATHAM	MA	945-0070	\$53.55
36-1	BENES, ELAINE	BENES, ELAINE	1340 MAIN ST	CHATHAM	MA	508-398-0393	\$0.00
5-1	BICKLE, TRAVIS	BICKLE, TRAVIS	52 COURT ST	CHATHAM	MA	945-3803	\$209.77
42-1	BOYD, WOODY	BOYD, WOODY	137 WOOD VALLEY DR	CHATHAM	MA	610-268-2543	\$2,667.38
107-1	BUNDY, ALBERT	BUNDY, AL & PEG	1040 MAIN ST	CHATHAM	MA	508-477-1399	\$1,279.51
3-1	CALLAHAN, HARRY	CALLAHAN, HARRY	12 CABOT LN	WEST CHATHAM	MA	945-3411	\$279.00
287-1	CHAMBERS, DIANNE	CHAMBERS, DIANNE	125 OCEAN PORT LN	CHATHAM	MA	945-3528	\$0.00
12-1	CLAVIN, CLIFFORD	CLAVIN, CLIFF	2 WESTWARD HO DR	CHATHAM	MA	428-3071	\$0.00
6-1	CONNOR, SARAH	CONNOR, SARAH	1414 MAIN ST	CHATHAM	MA	945-3659	\$76.51
18-1	COSTANZA, GEORGE	COSTANZA, FRANK & ESTELLE	90 SEAVIEW ST	CHATHAM	MA	508-945-2384	\$1,444.48
18-2	COSTANZA, GEORGE	COSTANZA, GEORGE	847 ORLEANS RD	NORTH CHATHAM	MA	508-945-2384	\$0.00
31-1	DE PALMA, LOUIE	DE PALMA, LOUIE	240 GEORGE RYDER RD	CHATHAM	MA	255-8077	\$1,757.86
7-1	DUNDER MIFFLIN	SHRUTE, DWIGHT	500 SHORE RD	CHATHAM	MA	617-272-2766	\$744.76
1329-1	DUNPHY, PHIL	DUNPHY, PHIL & CLAIRE	407 OLD HARBOR RD	CHATHAM	MA	500-845-5538	\$929.68
25-1	FLANDERS, NED	FLANDERS, NED	27 MALABAR RD	WEST CHATHAM	MA	945-1561	\$0.00
23-1	GRIFFIN, PETER	GRIFFIN, PETER & LOIS	62 ANNE BLAIR'S RD	NORTH CHATHAM	MA	945-3286	\$0.00
34-1	GUNDERSON, MARGE	GUNDERSON, MARGE	174 CROWELL RD	CHATHAM	MA	508-394-8723	(\$8.67)
38-1	HARPER, CHARLIE	HARPER, CHARLIE	31 NONANTUM LN	CHATHAM	MA	945-4317	\$134.86
39-1	HOULIHAN, MARGARET	HOULIHAN, MARGARET	38 WILKEY WAY	CHATHAM	MA	945-4748	\$1,374.15

Perform a global search by typing in the “Enter text to search...” box. In this example see how only fields that contain the word “West” are displayed.

Acct Site Num	Cust Last First	Site Last First	Site Addr1	Site City	Site State	Cust Ph1	Total Due
3-1	CALLAHAN, HARRY	CALLAHAN, HARRY	12 CABOT LN	WEST CHATHAM	MA	945-3411	\$279.00
12-1	CLAVIN, CLIFFORD	CLAVIN, CLIFF	2 WESTWARD HO DR	CHATHAM	MA	428-3071	\$0.00
25-1	FLANDERS, NED	FLANDERS, NED	27 MALABAR RD	WEST CHATHAM	MA	945-1561	\$0.00
14-1	WESTBERRY, JACK	WESTBERRY, JACK	279 CROWELL RD	CHATHAM	MA	800-255-5242	\$42.45

Perform a more specific search by typing directly below the column heading. This approach is more similar to what you were used to with the old search screen.



Click on the filter icon in the top-right corner of the column header.

Cust Last First
mon
MONTANA, TONY
MONTANA, TONY
MONTOYA, INIGO

Now you see a list of filter choices for this column. Check one or more to apply the filter.



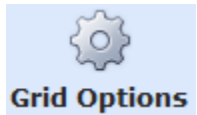
Choose “Last Cust (F4)” on the menu and a popup will show you a list of the most recent 20 accounts you have selected.

Choose one and you will be returned to their dashboard screen.

Select a Last Picked Customer

Enter text to search...

Acct. #	Billing Name	Site Name	Address	City
42-1	BOYD, WOODY	BOYD, WOODY	137 WOOD VALLEY DR	CHATHAM
107-1	BUNDY, ALBERT	BUNDY, AL & PEG	1040 MAIN ST	CHATHAM
1023-1	STARLING, CLARICE	STARLING, CLARICE	48 OLD ACADEMY RD	CHATHAM
30-1	SPARROW, JACK	SPARROW, JACK	209 INDIAN HILL RD	CHATHAM
16-1	MALONE, SAM	MALONE, SAM	162 HORIZON DR	CHATHAM
11-1	MCCLANE, JOHN	MCCLANE, JOHN	140 MAIN ST	CHATHAM
7-1	DUNDER MIFFLIN	SHRUTE, DWIGHT	500 SHORE RD	CHATHAM
14-1	WESTBERRY, JACK	WESTBERRY, JACK	279 CROWELL RD	CHATHAM



You can customize the list of fields that can be searched and filtered. Any of the fields that are available in Customer Reports can be added.

Display Options

Cancel (Esc) Save Changes (F1)

Available Fields

- Reg30
- Reg60
- Reg90
- RegAtLeast30
- RegAtLeast60
- RegAtLeast90
- RegBalAge
- RegCurrent
- RegTotal
- SaveCC
- SchedFuelCount
- SchedFuelNum
- SchedFuelsCSV
- SchedServ

Add/Remove

Swap Order

Selected Fields

- AcctSiteNum
- Cust_LastFirst
- Site_LastFirst
- Site_Addr1
- Site_City
- Site_State
- Cust_Ph1
- TotalDue
- RBFP
- ACSI
- AcctType
- Status
- SchedFuel

Enhancement to Autopost

You can now set an **Expiry Date** for an AutoPost record. For example, you want to schedule a monthly credit card payment through the end of the year.

When you are setting up an Autopost invoice, such as a Service Contract or Tank Rental Fee, you can indicate that it is **Auto Pay**. Previously, you needed two separate AutoPosts for this situation; one for the charge and the other for the payment.

Trans #: 3 CREDIT CARD

Amount: \$150.00 Use Current Budget Payment Always Use This Amount

Units: 1

Frequency: Monthly

Post As: Regular

Next Time: 7/23/2025

Expires: 12/23/2025

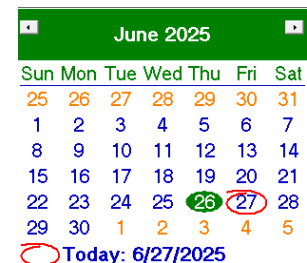
Last Time:

Credit Card: Customer's Default Profile for Active Gateway

Jan Feb Mar
 Apr May Jun
 Jul Aug Sep
 Oct Nov Dec

Miscellaneous Changes

- Some new fields available in Custom reports:
 - HasServContr**: “Y” indicates that an account has a scheduled service contract.
 - HasActiveServContr**: “Y” indicates that an account has a scheduled service contract that is active or has not expired.
 - Phone Type** and special Notes for each of your accounts’ phone numbers.
- The bug associated with dragging an appointment on the Service Schedule Calendar while in Month View mode has been corrected.
- Right-Click on a hashtag and choose “Show Info” to see when it was added to the account and by whom.
- When posting a payment to a new credit card, the option to save the card as a payment profile is checked by default. You may have accounts where you never want to save profiles and there is now a setting within their Billing screen to control this. If “**Save CC**” is set to “**N**” then the option to save a payment profile is not checked by default.
- The Invoice Viewer now clearly indicates when an invoice has been **Paid In Full**.
- You can now delete any unnecessary propane tank sizes that had previously been added.
- When you add a new Site to an account, it will use the same Account Status and Type values as the master account, instead of the default values that are used when you create a new account.
- The Overdue Notice report has a new **Over 45 Day** category that warns about being placed on a Credit Hold status.
- The Tickets Printed report now supports an **Add to Quick Pick** option.
- When creating a new Service Invoice and you link it to the original workorder, the work order will be automatically marked as Completed.
- Some of you experienced an error when attempting to email a proposal or save it as a PDF document. We tracked this down to be caused by a Windows Update and how the Times New Roman font was interpreted. Eliminating use of that specific font in the proposal template has fixed this bizarre issue.
- If an account has an active tank monitor, the Meter Ticket screen did not always display the correct Need based on the tank monitor reading. This bug has been resolved.
- The **date picker calendar** used in the Meter Ticket screen has a new color scheme that makes it much easier to see the days of the week



June 2025						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Today: 6/27/2025