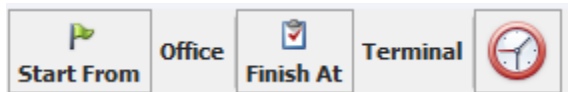


This document describes the various enhancements and modifications to DRM Windows that occurred between versions 11.2.412 and 12.1.420.

Enhancements to Routing

Azure Maps has replaced Bing Maps and provides 5 sets of map tiles: Basic Road, Dark Road, Satellite Basic, Satellite Hybrid and Satellite Labels.

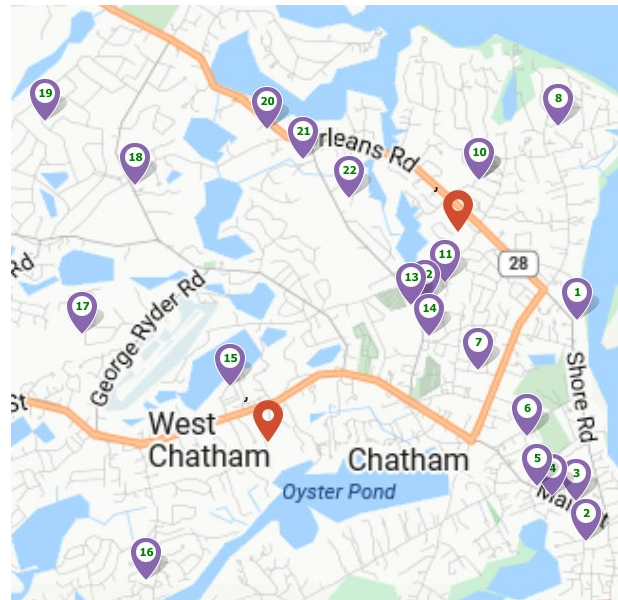


You can now specify Starting and Ending locations that are separate from the route's delivery addresses.

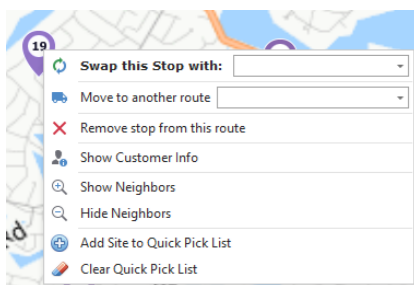
Click on the **Start From** and **Finish At** buttons to open the **Location Picker** screen and see the list of choices. You can add new locations here.

If you consistently start from or finish at the same location, you can identify it as the Default location so that each new route will reflect this.

Notice how these locations are displayed with a different color pin on the map.



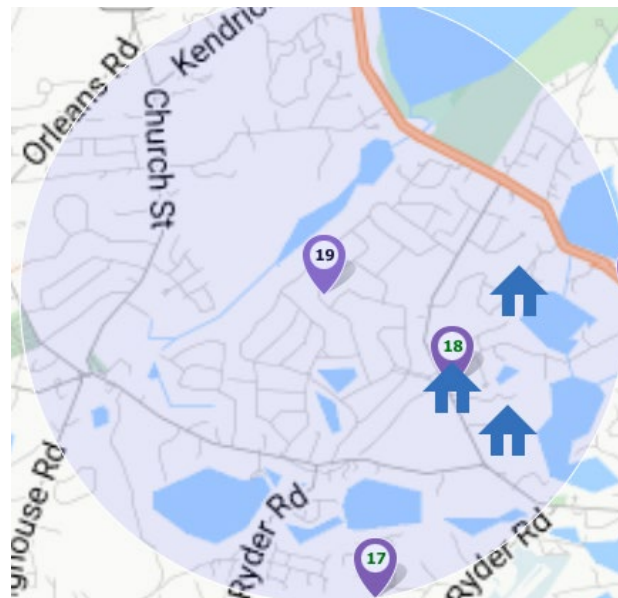
The **Show Neighbors** feature introduced in version 11.1.400 has been added to the Routing screen.

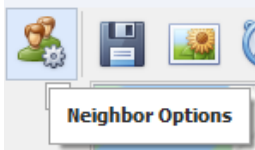


Right-click on a pin and select **Show Neighbors**

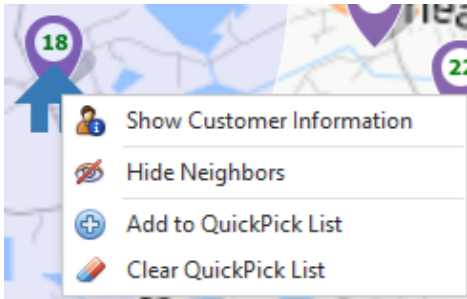
In this example, neighbors are defined as Automatic accounts within 1 mile of the address and displayed as blue house icons.

Hover over a neighbor pin to see their name and address.





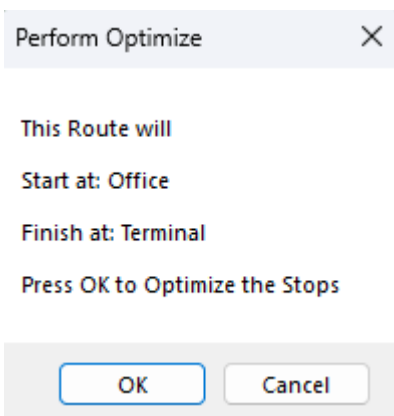
You can manage how the neighbor feature behaves by clicking on the **Neighbor Options** button on the menu.



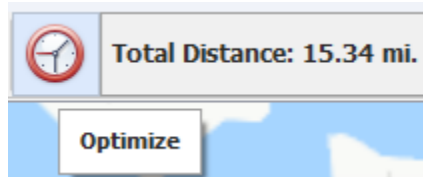
Right-click on a Neighbor pin to display this list of choices.

Show Customer Information will display the customer popup screen that you are familiar with.

Add to QuickPick List is a handy way to tag a group of neighbors by adding them to your Quick Pick list. You can then use this list to potentially generate a ticket for each account and then incorporate them into the route

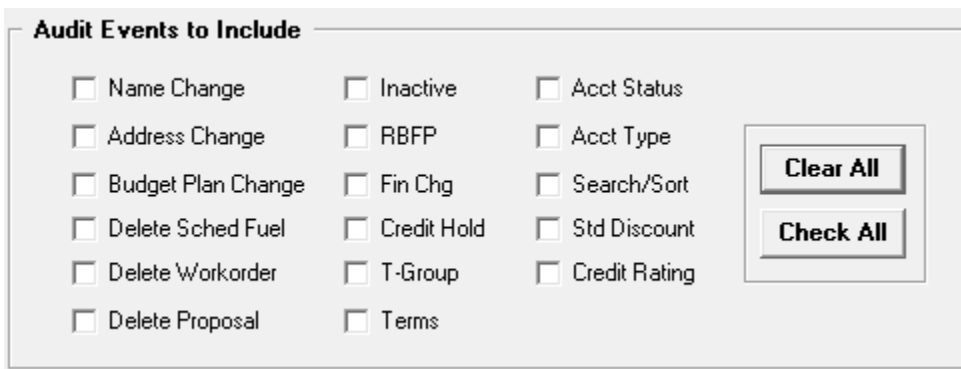


Click the **Optimize** button to arrange the stops in the best sequence to minimize driving distance. The **Total Drive Distance** is also updated.



Enhancements to Site Record Auditing

More changes within a **Site** record are now tracked and can be reported with the **Site Information Audit** report.



Fun fact: from within the **Site Info** screen for an account, press **(F10)** to see a report of all the audited changes made to this account.

Enhancements to Online Ordering from the Portal

- **Add-Ons** is a new feature that augments the ordering experience. You can build a menu of add-on charges, such as Fuel or Anti-Gel Additive, Priority Delivery, and assign the appropriate prices to them. Driver Tip has been surprisingly popular! Many people appear to be genuinely grateful for the service they are receiving under harsh conditions and appreciate the opportunity to reward the driver. These add-ons get bundled with the fuel order and included in the amount due. Add-Ons are optional for the customer to select, except there is a scenario where you can elect to have fuel additive automatically added to the order when Heating Oil is ordered for an outside tank.
- **Block Tiered Discounting**
If you use **Tiered Volume Pricing** (price drops at larger volume levels), and also have **Instant Discount** customers (example their pricing code is set as **R-.10**), you may not wish to allow the instant discount for larger volumes as the price is already discounted. You can configure this in the Fuel Setup screen within the Pricing Manager.
- **Suspend Ordering.**
There may be times when you need to temporarily suspend online ordering. Managing a large volume of orders with unfavorable weather forecasted to price volatility are both examples of occasions when you might want to apply the brakes.

Enhancements to Deleted Tickets Management

When you delete a saved ticket, it is retained for 90 days and can be found using the **Tickets that were Deleted** report wizard. If you select one or more tickets and right-click with your mouse, you will be presented with an option to **Recover Selected Tickets**. Upon your confirmation, the tickets will be restored to the customer accounts and the Saved Ticket list.

Enhancements to the Finance Charge message

If your business supports Finance Charging and the customer is eligible for the fee, a finance charge message prints at the bottom of their statement and invoice. The default message looks like this and is based on your settings for rates and overdue days:

After 30 days a Finance Charge with a periodic rate of 1.5% on the overdue balance (ANNUAL PERCENTAGE RATE = 18% will be charged

The text for this message can now be customized for your purposes.

Enhancements to Digital Dispatcher Interface

- It is now possible to import a copy of the receipt that is printed on the truck and given to the customer. Previously, in order to view the receipt, you would have to use the DD app but now you can display it from the batch screen in the DRM stoplight app.
- If you have a subscription for our **Document Manager** service, it is now possible to convert each receipt to a PDF and link it to the invoice when it is imported into DRM. When you email a copy of the invoice to the customer, the receipt is also included as an attachment by default.
- Digital Dispatcher now supports texting the receipt. The 1st phone number from the DRM Billing record that is labeled as a Cell Phone will be included in the ticket details sent to DD.
- **Instant Discounting.** If an account's **Price Code** in DRM is set as "**R - .15**", this can be implemented as an instant discount, whereby the customer will clearly see the discount being provided on the receipt. Previously this type of price code was interpreted as a price adjustment where the account was simply charged the reduced amount. In addition to the receipt clearly displaying the discount, the invoice imported into DRM will have a separate Fuel Discount line item.
- A ticket for an automatic account **FILL** order includes a value for the estimated gallons to help the dispatcher prepare a route. There are now 4 choices for indicating how this value is determined:
 - **DROP** Your optimum quantity delivered to this tank
 - **USABLE** The tank's usable capacity
 - **TANK** The tank size, aka its USWG capacity
 - **ESTIMATE** The DRM calculated estimate based on last delivery and burn rate.
- If payment is collected by the driver, it can be identified as either **CASH** or **CHECK** (along with check number), and the appropriate transaction code will be used when importing into DRM.
- **Split Ticket.** If the delivery was for a fuel contract and the remaining contract gallons was exceeded, the delivery can be split into 2 invoices when importing into DRM. One with the contract price for contract gallons used and the second for the excess at the off-contract price.
- **Route Locking.** Although extremely rare, it was technically possible for 2 users to potentially send the same route to DD at the exact same time, resulting in duplicate orders. Now when someone prepares to send a route, it is locked and cannot be sent by anyone else.
- **Saved Ticket Note.** Similar to how the ticket memo is saved in the account's Fuel Schedule record when the ticket is sent to DD, the ticket note is likewise saved.

Miscellaneous Changes

1. A **Running Balance** column has been added to the **Statement**. It is the right-most column and should be useful for helping track changes to the balance over the activity period displayed.
2. The **Saved Ticket** list now sorts the list by default according to when the tickets were saved. You can easily change this sort order by clicking one of the other column headings.
3. When you add a new part to your inventory it will use your default margin unless you adjust it. Set your default margin in the option for **Inventory – Default Margin for New parts** in the **Utilities (F7)/Options (F7)** screen. Example, 1.40 would represent a 40% markup over cost.
4. The **Tickets Printed** report now sorts the list by default according to when the tickets were printed. You can control the sort options in the report wizard.
5. When you post a fuel invoice, the driver and truck is remembered, which is then used to prefill the next new invoice. Now, after you post a batch, the truck and driver details are reset. You will see the same behavior for Technician and Service Van when posting service invoices.
6. When you print a ticket, the **Saved Note** is now saved in the account's Fuel Schedule record, similar to how the ticket memo is saved.
7. When you sign in or out of DRM Windows, you are used to seeing friendly reminders or notifications about tasks that may need attention. **Expiring Service Contracts** is now included in that list. You will be informed if there are any service contracts expiring within the next 30 days.
8. Changes to an account's **Billing Cycle** code is now included in the **Billing Information Audit** report.
9. The **Transaction Detail and Summary** reports now show how many unique accounts are associated with each item that is reported. For example, it can be a convenient way to see how many customers were billed for a service contract over the reporting period.
10. Email addresses are now verified before they are saved to confirm they conform to specific criteria. It does not necessarily mean the email address is valid. Only one email address can be saved in the email field. Additional email addresses should be added as new contact records.
11. The restriction that prevented a locked proposal from being deleted has been removed.
12. The Fuel Delivery report wizard now displays the total tax amount for each invoice in the grid. Previously that was only shown on the printed report. The tax is also included when exporting to Excel.
13. There was a bug when filtering **Post Total Batches** for a specific year where batches posted on the last day of the year were not displayed. This bug has been fixed.
14. There are 3 new choices for **Propane Uses**: Wall Heater, Construction, Forklift.