You'll soon see that we've been very busy listening to your suggestions and turning them into exciting new features. Be sure to spend some time playing with each of the new reports as you'll find that they can be used in many different ways. We've also been working on making it easier to *learn* about the software by making short video tutorials that you can watch from our website. Visit www.drmnet.com and choose Revisions from the menu. *You will need speakers or headphones!* Keep checking back as we'll be adding more clips over the upcoming months.

We do welcome and appreciate all your feedback, so please let us know what you think about these latest changes and don't stop suggesting improvements.

Have a great summer! **Keith, Dave and Joe**

New feature – Letter Writer

You now have a powerful built-in word processor that allows you to easily write, format and save letters or contracts. The mail-merge feature helps you select who to send the letter to. Send a letter to one person or several hundred with just a few clicks. The easiest way to learn about using this new program is to visit our website and watch the video tutorial. You have to install the Letter Writer program before you can use it. The Setup application on your new master CD will guide you through this easy task.

New feature – Quick Tik

This new screen simplifies the printing of automatic tickets. Simply indicate how many degree days or calendar days to pull ahead, see how many customers need fuel, decide the order you want the tickets to print out, and print. If you don't need to set-up delivery routes or scroll through the list of customers who come up for delivery, you'll find Quick Tik to be a useful alternative. To learn more about it, visit our website and watch the video tutorial.

New feature – System Performance Tune-up

After you perform a backup, don't be alarmed if you see a new screen prompting you to "*defragment your indexes!*" As scary as this may sound it's actually a good thing and way more fun than a root canal. This new program simply moves some of your data around so that it can be displayed faster. It should only take a few minutes and you will definitely benefit from this routine tune-up. You will only see this message every 3 months.

New feature – Purging Transaction History

If you are discovering that you have too much history, you might want to consider deleting some of the older transactions. This will help speed up your backups and make it easier to work with accounts that have a lot of activity. You will also be able to delete old accounts if they no longer have any history. This is equivalent to the "Killing History" feature from the old program. Please let us know if you're interested in this, so that we can help you weigh the pros and cons and help you perform the purge.

New concept – A Drill-Down Report

Similar to a standard report, a Drill-Down report has a wizard screen that helps guide you through choosing the information you wish to see reported. In addition, it provides the option of displaying the information in a list on the screen, which you can scroll though and also "drill-down" on to see additional information. *We've changed Transaction Finder to work this way.* You can re-sort the list by clicking on one of the column headings. You "drill-down" by either double-clicking on a selected row or right-clicking on it. You double-click if there is only one relevant "drill-down" screen. Otherwise right-clicking will display a pop-up menu listing the choices of "drill-down" screens. Many of the drill-down screens will allow you make corrections on the fly. You'll start seeing more and more of this type of report in the future. Be sure to let us know if there's one in particular that would help you out.

New drill-down report – Budget Information

This report gives you considerable insight into your budget customers. For example, you can easily spot who has fallen behind. Begin by selecting the month for which payments should have been received. Decide if you only want to see certain customers (Behind/Ahead/Normal/Out of Cycle). You can also optionally choose whether to limit the list to budgets beginning or ending in a particular month.

Click "Display list" to see the drill-down list. Jump directly to an account by double-clicking. Re-sort the list by clicking on one of the column headings. Click "Add to Quickpick" if you want to add all the names displayed to your QuickPick list. Click "Print Report" to print the report.

New drill-down report – Fuel Scheduling Information

This report is broken down by product and shows details about who is scheduled for each one, such as customer name, address, zone, auto/call, tank, drop, reserve %, and last delivery. The wizard will help you build one of more filters to control the information you see. You'll find this very useful for finding customers who have been set-up with incorrect tank sizes or inappropriate drops. For example, you can easily list your automatic customers who have large tanks with a small reserve. *To use the drill-down feature and display the list of customers matching your criteria, you first have to select just 1 fuel.*

New report – Delivery Statistics

This report is grouped by customer and shows statistical information about each fuel product delivered during the specified period, such as total # deliveries/gallons, biggest/smallest/average drop & price paid. You can use the available filters to target the report for specific situations. For example, list automatic customers where less than 80 gallons were dropped, or list customers who paid below a certain price. You can elect to print the site address on a separate line below the account name if you check "Print Site Address." A summary section is displayed on the last page.

New report – Part Sales

This report details part sales for the specified period. The wizard gives you considerable control over which items are displayed and how they are grouped and sorted. If you do not want to see all parts sold within the period, open the "Quick Pick Parts" screen and use the filters to help find and select either groups or specific parts. You can choose to report on each sale, or summarize the total sales for each part for the period, or both.

Enhancements to Budget Processing

- A budget customer no longer *has* to be coded as a "B". As long as there are valid non-zero entries for each of the three budget control fields (Budget Payment, Starting Month, Months in Cycle), the customer will be considered a budget customer and statements will ask for a budget payment. You'll find this to be especially helpful when a budget customer also qualifies for Fuel Assistance. In this case, code them as an "F" until their assistance is used up and they will continue to be asked for budget payments.
- A statement can now be printed to request the remaining budget balance once the customer's season has ended. For example, if a customer has an outstanding budget balance at the end of his season, the next statement will request the full amount. *Note: if this is a feature you want to use*, you need to first "turn it on" via your "Utilities/Options" screen. Locate the entry for "Printing/Statement – Request Bdgt bal. when plan has ended" and change the value to "Yes".

Enhancements to Credit Card Processing

1. There is now a field to enter a Reference Number (a meter ticket or invoice number). Also, if you have to call for an approval and must do a "Forced Ticket" transaction, a field will appear for the authorization number. To make this all possible, a new pop-up was developed that is wider than the original.
2. On the right half of the new pop-up you will see your company information as it will print on the receipt and here is a new button that will allow you to choose a receipt printer.
3. The approach for correcting a previously posted credit card transaction has been improved to accommodate partial returns. You still need to locate the original transaction from the "View Tran (F5)" screen and select "Void" from the menu. However, note that this no longer immediately voids the DRM transaction. Instead, the Linkpoint screen is displayed where you can choose to perform a void or a full/partial return. Only after your selection has been successfully approved will DRM be updated. A "Return" will result in a new charge transaction "C.C. Return" being posted to the account. A "Void" still results in a void transaction.
4. A few of our customers were getting 'Memory allocation errors' when attempting to post credit cards for the second time each day. If you are one of those, give us a call. We'll make a minor adjustment and fix the problem.

New report – Credit Card Transactions By Date

This is an alternative to the batch credit card report which shows credit card activity for a particular batch. Instead this report groups together all credit card activity for each day. You can choose to report each transaction or just a daily summary. The daily summary totals all activity for MC/VISA etc. and can be used as a handy cross-reference with your merchant account statement.

Report Enhancement – Invoice Summary with Details

1. Prints a line for each account's previous balance (as long as the "Show Previous Balance box is checked)
2. Prints a line for each account's site address (as long as the "Show Address box is checked)
3. Prints the Site Name in addition to the Billing Name (if it is different)
4. Now works correctly if you run this report with criteria that selects over 1000 accounts.

Miscellaneous Changes

1. The Meter Ticket screen now lets you to enter a Delivery Date if you check the box "Print On Ticket." Call us if you would like to start using this feature so that we can assist you with locating an appropriate section on you ticket for this information to print.
2. The Site screen has 2 additional lines (4 total) for entering Delivery Information. Only the first 2 lines will be displayed on the Main Account Dashboard screen and printed on your ticket.
3. The Journal Entries by Batch report now includes a summary section at the end of the report.
4. There is a new choice for Autopost scheduling: every "So Many Days".
5. A QuickPick list can be sorted by clicking on one of the column headings.
6. From the QuickPick list you can access additional customer information by clicking "View Account"
7. If a user has been setup to have No Access to Reports she can still use "Apply Criteria" on the Customer Lookup screen as long as she has Full Access to Daily Work.
8. The RBFP code is now displayed on the "Aging – Total Balances" report.
9. When you find yourself in one of the report screens and want to clear the choice for "Customers to include", simply click the new "Reset" button.
10. When you enter an inventory purchase transaction for a part, the "Reorder" check is removed.
11. Picking or adding/editing ticket and statement memos is much easier. A statement memo can now be as long as 80 letters. The ticket memo is still limited to 64 letters so that it can fit on the ticket.
12. The Last 6 Delivery fields (DelvHist1...6) have been added to the list of custom report field choices. This is the same information that may be printing on your ticket (example: "03/16/10 214.9 4.6k").
13. You can now set your daily prices from the Delivery Scheduling Menu. Type in the new price/cost, highlight all the appropriate fuels, and <Enter> to apply.
14. New report "Transaction Summary By Site." This report is similar to the Transaction Detail reports except that only totals for each type of transaction are displayed.
15. New report "Inventory Purchases." This report will detail either Fuel or Parts purchases over a particular interval. It is broken down by Vendor and summarized on the last page.