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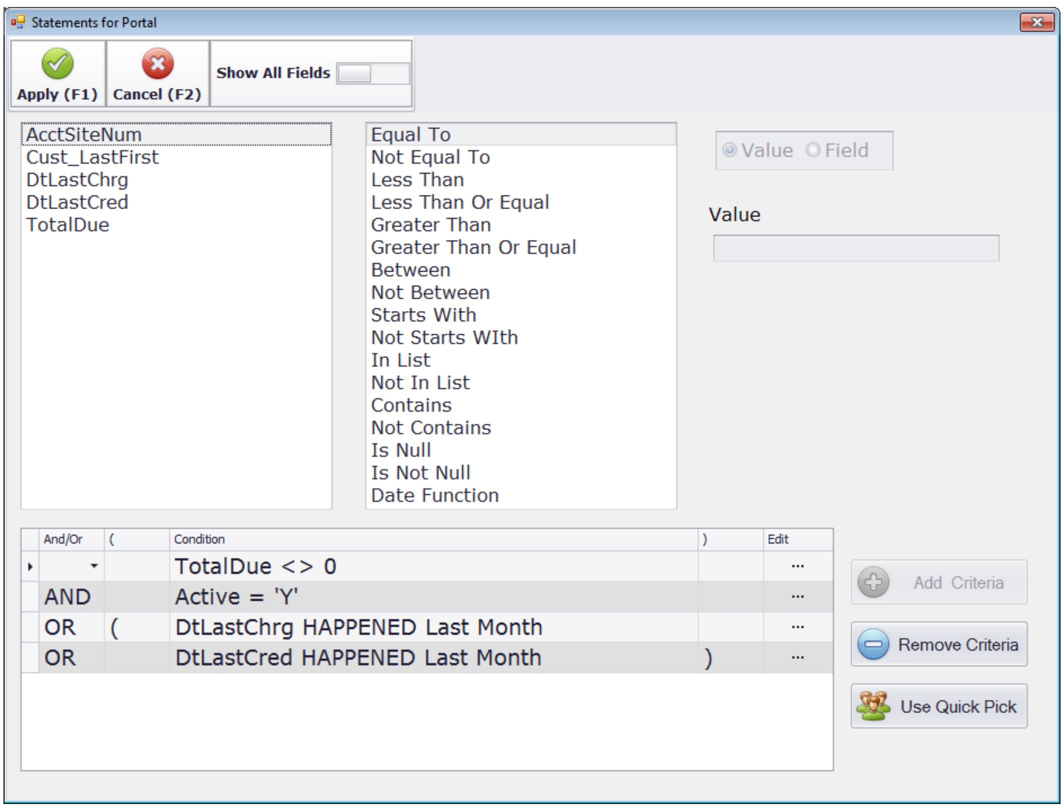
software for fuel delivery
(800) 255-5242 • www.drmnet.com • 33-A Village Landing • Chatham, MA 02633

Uploading Statements to your Customer Care Portal

Follow these steps each month to save PDF copies of your statements and upload them to the portal.

1. Create and save a Custom report that identifies the statements you want to produce. Name it "Portal Statements."

   This example has criteria that will produce a list of accounts with a balance at month-end or had transaction activity during the prior month.

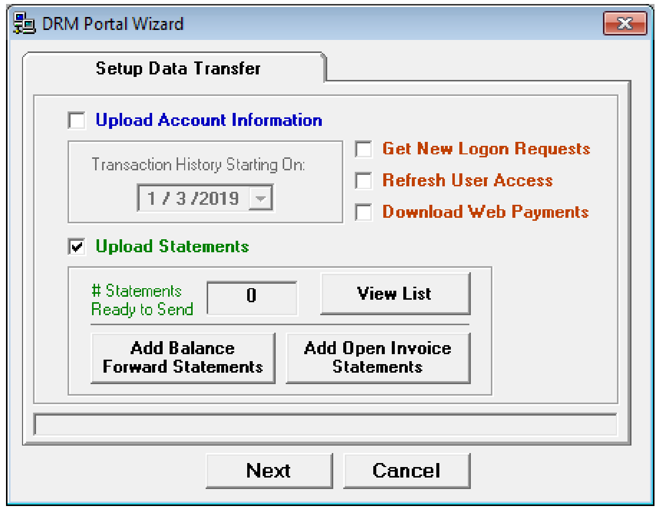


2. Open the DRM Portal Transfer Application.

3. Select "Update Portal (F1)" from the menu.

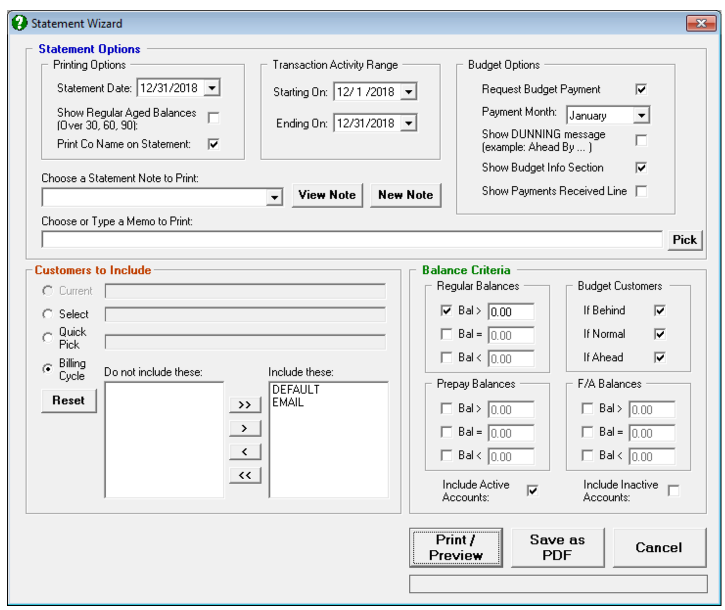
4. Check "Upload Statements" as shown.

5. Press the button "Add Balance Forward Statements" to open the Statement Wizard.



6. Complete the wizard just as you would to print paper statements:

- Set the Statement Date
- Set the Transaction Activity Range
- Choose a Note and Memo as needed
- Check "<u>Request Budget Payment</u>" if desired and if so be sure to select the appropriate month.



7. Select the accounts who need statements:

    - In the “Customers to Include” section, choose the "Select" option. This opens your Criteria Builder screen and displays a list of saved reports. Select the “Portal Statements” report that you saved in Step 1.

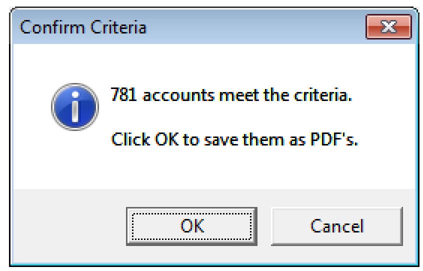
    - Press “Test (F6)” on the menu to show the list of accounts and then press Escape to return to the statement wizard.

    - Press "Print / Preview” and spot check a variety of statements.

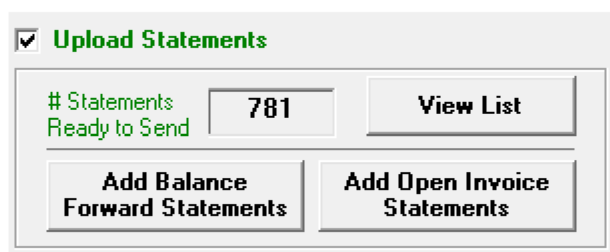
    - Press Escape to exit the preview screen and return to the wizard. Press the button labeled "Save as PDF".

    - Respond to the confirmation message.

    - Note that it may take several minutes to generate the PDF documents. The progress bar will show progress.



    - Press Cancel to close the Statement wizard and return to the Data Transfer screen, which should now indicate how many statements are ready to send.



8. Press “Next” and the PDFs will be uploaded to the portal. Within the hour your customers will be notified by email that a new statement is available for their review.