To install this revision, simply insert the CD into each of your computers and the Setup program will automatically run. Click <Continue> next to "I want to install the latest DRM Windows software update." You will be prompted to perform an additional step when you are updating the server.

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 heating season! *Keith and Joe*

Backup Reminder – Plan for disaster

It's not exactly fresh news but we strongly encourage you to perform a daily backup to some other storage device such as a CD/DVD or Memory Stick. However, don't just use the same device every time. Better to have one for each day of the week, and an additional one for end of month. The ideal approach is to periodically restore a copy of the backup onto another computer. That way you know for sure the backup is reliable. Please call us if you have any questions about this or want to confirm that you have a reliable backup process in place. ***Your information is simply too valuable to chance to faulty equipment.***

New feature – Account Status

You can now assign a "status" to each of your accounts from the Site Info screen. The status code is always displayed in the upper right section of the dashboard, directly above the aged balance breakdown.

To start with, all your accounts have the status code "Normal". You can invent your own list of status codes based on what makes most sense for you. Some examples are "Credit Hold", "Deadbeat", "Collections", "Magistrate", "Special Pricing" etc. You can run reports based on the different status codes. For example, list your Automatic customers who are due for delivery but have a "Credit Hold" status.

To manage your list of statuses, go to the menu "Utilities (F7) / More (F9)" and then choose "Acct Status (F2)". You'll see a list of the available status codes and how many customers are assigned to each code. To add a new code, choose "New (F1)." You need to enter the code that will be displayed for the status. You also need to enter a description of the status and assign a color for that particular status. Assign different colors to help draw attention to certain status codes. Similar to Posting Words, each status has a number assigned to it to help you organize the list, and you can easily rearrange the list by choosing "Move Up", "Move Down"

Both the Status Code ("Status") and Status Number ("Stat#") are available from the list of Custom Report fields.

New feature – User Fields

There are five new User Fields in the Site Info screen. They are labeled "User Field 1", "User Field 2", etc. but you can define more appropriate labels to better describe how you are using each one. You have complete freedom to utilize these new fields as you see fit, but do try to use each field for the same purpose for all your accounts.

To assign a better label to one of the User Fields, go to the "Options (F7) / Utilities (F7)" screen and select "User Fields" from the list of categories.

The new fields are included with the list of available fields on the Custom Reports screen. You select the field as "User Field 1" etc. but the assigned label name prints on the report.

Enhancements to Quick Tik

Quick Tik has developed into a simple but effective approach for reporting and printing tickets for your automatics who need a delivery. If you haven't used it before, check it out and see if you find it to be a better alternative to building routes.
First establish your criteria for degree day and calendar schedules. Narrow the list down to certain zones and products if you want. You can use the new Status Code to also narrow the list down. See how many tickets need printing. Pick a memo to print. Print the report and then print the tickets. Finally, if you want to do anything else with this list of accounts, click on the new "Quick Pick List" button and they will be added to your Quick Pick.

New feature – Email Statement/Invoice

You can now easily send a statement or invoice to a customer by email. Continue to preview the statement on the screen as if you were going to print it, but instead of printing it, choose "Email (F3)" from the menu, and the email screen will open up. If the customer's email address is already on record, then it will fill in automatically, otherwise you can type it in and elect to save it. The subject line helps the recipient understand what the email is about and it will resemble "New document attached from <Your Co Name> to <Customer Name>." You can type in a personal message to the customer but you do not have to. You can use the CC field to send a copy of the email to another address. If you check the "Send a copy to Sender's In-box" then you will receive a copy also, but there's really no need to do this. If the customer's email address is wrong, then the email will simply bounce back to you.

In order for emailing to work correctly, DRM needs to first be setup with your details. If you're already using an email application like Outlook or Outlook Express, then it's fairly straight-forward to copy the settings already in place. ***Please feel free to call us for help…***

• Company / Company Email Address	Your email (the customer may reply to)
• Email Settings / Mailbox Username	The username associated with your mailbox
• Email Settings / Mailbox Password	The password for your mailbox (you will only see 4 dots since it is encrypted)
• Email Settings / Outgoing Mail Server	SMTP server name
• Email Settings / Outgoing Server Port	SMTP port number
• Email Settings / SSL is enabled	Check if SSL is used
• Email Settings / TLS is enabled	Check if TLS is used

New feature – Fuel Categories

Open the Fuel Maintenance screen and you'll see a new field called "Category." All your products are assigned as "Unknown" to start with. Choose the relevant category from the list, such as "Kerosene", "Clear Diesel" etc. If a category that you'd like to use is not in the list, then you can add it. Assigning appropriate categories helps to group similar products. You can then run a report for a particular category (for example, the Heating Oil category would include all the various #2 products you have set-up.)

Enhancements to Fuel Inventory

- A purchase transaction now prompts you for both Net and Gross gallons. The Gross is initially set to the same number entered for the Net, so you only have to change it if the supplier lists a different value.
- You can now enter the Total Cost if it is listed and the Unit Cost will be calculated.
- The BOL # can now be entered into its own field and is printed on the Purchase report.

- You can enter the Terminal you loaded from.
- The Year-To-Date purchase and sales numbers now display correctly on the main Inventory screen for each location.
- New report, "Inventory Purchases – Fuel" to help you reconcile your purchases with the supplier's paperwork. You can filter by various fields such as product, truck, supplier & terminal. You can choose to show each purchase in a drill-down list, print the report, or export it directly to Excel.

New feature – Built-in Credit Card Processing with Authorize.Net

Up until now, if you wanted to process credit card transactions through our software you had to be a First Data customer as we were only compatible with their gateway. The Authorize.Net gateway works with most major merchant account providers and there are several advantages to using their service.

1. PCI compliance/Security. You're concerned with protecting your customers' confidential information. Credit card information is no longer stored on your computers. Instead it is stored in the vault on the Authorize.Net secure servers.
2. Flexibility. You can manage up to 10 different cards for each of your customers and enter a note for each one.
3. Freedom. No need to switch merchant account provider if you're satisfied with the rates and service you receive.

It's worth your while to shop around for the best rate as you can potentially save 1000's of dollars in processing fees. Dave Rauscher with Baystates (508-246-5000) provides competitive rates to many DRM customers. Rich Giaccio is an electronic payment specialist with Purepayments (914-469-3227) who specializes in fuel dealer rates.

Miscellaneous Changes

1. New Report – Fuel Deliveries. This lists deliveries for the specified time-frame. You can apply various filters and limit the list to certain products or customers. Right-clicking lets you drill-down on the list and go directly to the invoice or customer. You can also print the report or export it to Excel.
2. Check out "F6" on the Posting menu! Print a statement for the current customer. Sure beats the old-way, right?
3. Printing to shared Dot Matrix printers has been improved considerably.
4. The Tickets Printed report has more criteria to better help you quickly discover any missed deliveries.
5. If you don't like how the Meter Ticket screen automatically defaults to "Fill", then you can override this by editing the new option "System / Meter Ticket Screen - Default # Gallons." You can change this to any number you like, but if you're hoping to avoid printing the wrong number by mistake, then you should consider using "1."
6. New option for printing on a #6 ¾ envelope (3-⅝" x 6-½"). To use this style, edit the option "Printing / Laser Envelope Template" and set the value to "ENVL3"
7. You can now delete a line when posting an invoice! Navigate to the Ref# box on the line you don't want. Press "Shift" and "Delete" at the same time and you will be prompted about deleting the entry.
8. After you print a receipt, you will be prompted about printing another copy. If you want to bypass this message, then edit the new option "Printing / Prompt for Additional Receipts."
9. The Print Daily Invoices screen now lets you enter a specific "Batch #" to help you further narrow down the invoices to print.

10. You can now Un-Post a Batch. This will then allow you to edit the original transaction. There are pros and cons to this practice and we'd like to review them with you before enabling this feature.
11. If you like to use "Quick Pick" to work with certain groups of accounts, you've probably thought that it would be handy to easily see this same list on the customer look-up screen. Now you can accomplish this by clicking on the new check box "Use Quick Pick" at the top of the screen.
12. The Work Order screen now allows you to enter and print a Service Date if you check the box "Print On WO." If you always want the box to be checked, then edit the option "System / Work Order Screen – Check 'Print Service Date'"
13. You can now swap 2 account numbers. This will be useful if you want to re-use some older (lower) account numbers that are assigned to inactive customers. From the Account Lookup screen, choose "Cust Tools (F5)", followed by "Swap 2 account numbers" and the wizard will guide you.
14. Fixed the bug in the Meter Ticket screen where a tax amount could not exceed $1000.
15. A customer's email address can now contain up to 50 characters.
16. You can now print the initials of the person who printed the ticket on a Meter Ticket.
17. On the "Post Credit" screen, the Ref# is now displayed in the list of open invoices.
18. You can choose to print either the Bill or Site details on the Note detail report.
19. New option "Meter Ticket Screen – Check Save Delivery Info." This setting controls what happens to the "Save Delivery Info" check-box when you're in the Meter Ticket screen and modify the delivery information.
20. The fuel scheduling screen now displays the Delivery Date that was promised (if applicable) when the ticket was printed.
21. You can now have over 32,000 active accounts!
22. The new option "System / Show Credit Available Only for RBFP codes" controls whether the Available Credit amount is either hidden or displayed on the dashboard screen. Right now this is set to "R" which means it is just displayed for "R" accounts. For example, set it to "RBFP" to show it for all accounts or set it to blank to always hide it.
23. New field "FEIN" on the billing screen to keep track of required information for tax exempt accounts.
24. In many reports you have the choice of printing either the Site Name or Billing Name. If you prefer to generally use the Site name, then edit the new option "Reporting / Display Site Name instead of Billing Name."
25. The inventory module now has user-level security associated with it. You can grant full, read-only or no access to specific users.
26. The report "Posting Setup – Fuels" now prints taxes to 5-decimal places.
27. The fuel delivery route report now prints each customer's whole balance instead of rounding to the nearest dollar.
28. The Delivery Statistics report now includes a summary section at the end to show how many customers were included in the report.
29. Fixed the problem with printing Custom Reports in Landscape layout.
30. The Quick Pick screen now displays the RBFP code and City in the list.
31. You can now print Postcards for a Quick Pick list.
32. New report, "GL Account # Breakdown" categorizes your posting words by GL #.
33. Customer notes related to "Voided" transactions are hidden by default. To see them included with the other notes, simply click on the arrow next to the "Type" column heading on the Notes list and choose "Show Voids." To always show the voided notes, edit the new option "System / Show Voided Notes by default."
34. Circulator is now spelled correctly! ☺