DRM INC
software for fuel delivery
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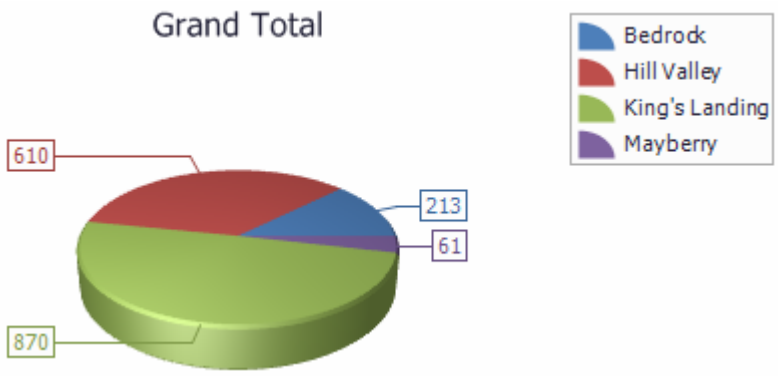
This document describes the various enhancements and modifications to DRM Windows that occurred between versions 8.3.258 and 8.3.260.

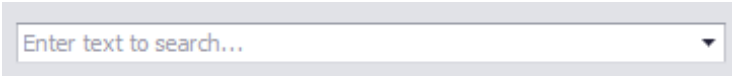
New Feature: Custom Report Builder Version 2.0

This new version makes it even easier to build and save custom reports while at the same time offering many more features for analyzing and working with your data. For example, say you want to see how many automatic customers you have broken down by town or zip code. The new Pivot Grid add-on is a data summarization tool that helps to see the big picture. You can even make charts and graphs of the results just like this example.



When you open the Custom Report app. you will see a list of the previously saved reports along with this menu.

Start typing in this box to filter the list and quickly find a particular report, or type your user-name here to see just your reports listed.



Exit the Program.

Create a new report.

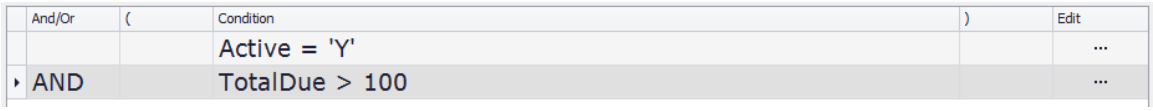
Delete the selected report. You will be prompted to confirm this action.

Save the selected report with a new name.

Run the selected report and show the results (same as double-clicking on a report)

Editing a report

Use the ***Field Selector*** to pick and arrange the fields you want to see on the report. Use the ***Filter*** to add the criteria for retrieving the relevant records. *Tip*: *you can now edit existing criteria by selecting the appropriate record and clicking "…" in the Edit column on the right-hand-side.*



And/Or	(	Condition	)	Edit
		Active = 'Y'		···
AND		TotalDue > 100		···

Searching & Filtering

Run the report to see the results that match your criteria. There are 2 new techniques for searching through the list of displayed records.

- At the top of each column you will see the name of the field. Directly below that is a search box that performs a search within just that field. The results are filtered as you type in the search box.

- Located above the column headings and directly below the menu-bar, you will see the global search box. This also filters the results as you type in it but ***all the fields*** on the report are examined for matching information. For example, a useful tool is to build a report that includes all 6 possible phone numbers for an account. Type a phone number in the global search box and all the phones numbers will be searched for a match.

Best Fit

When you first run a new report, the width of each column is automatically sized for the "Best Fit", which shows all the information on a single line without wrapping the text. You can manually adjust a column width by dragging its right-side border left or right. To reset to the "Best Fit" size, right-click on the column heading and select "Best Fit" from the pop-up menu.

Menu Bar

Close the results grid and return to the list of saved reports.

Save changes to this report. You will be asked to provide a name for the report if this is a new report.

Save this report with a different name. If another report has previously been saved with that name, you will be prompted about over-writing it.

Modify the selected fields or sorting for this report.

Modify the criteria for this report.

Open the Print Preview screen. From here you can print or save the report to various formats such as PDF, Excel, CVS.

Open the Pivot Grid screen to summarize the results. See the pivot grid example below.

This exports the report directly to Excel if it is installed on your PC.

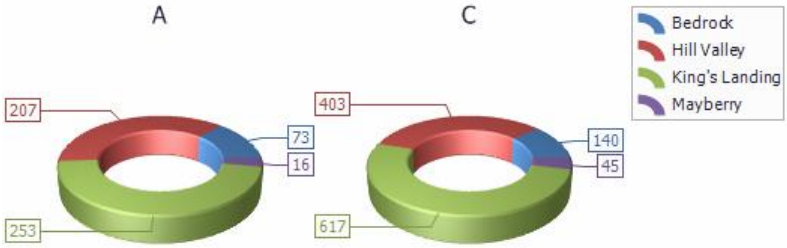
Open the Customer Information screen, showing account details for the selected record.

Open the print options where you can set the orientation and margin widths. These preferences are saved with the report.

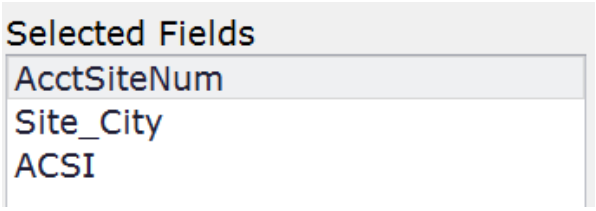
Pivot Grid Example

The Pivot Grid is a powerful tool for analyzing and summarizing your data.

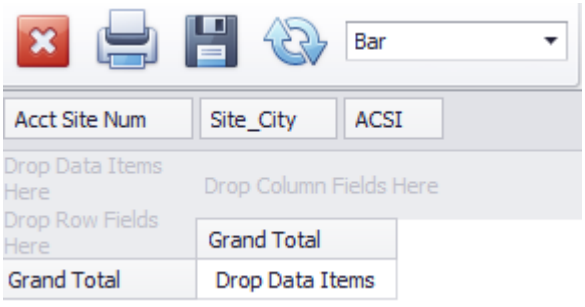
Follow along with the example below to see some of the possibilities.



- Create a new report that includes these 3 fields. Run the report to display the results grid and click on the menu button for Pivot Grid.

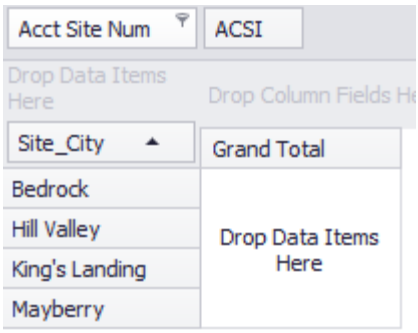


- The screen will look like this to start with. The 3 fields you picked are displayed as buttons lined up below the menu, ready to be ***selected, dragged*** and ***dropped***. You drag an item by clicking on it with your mouse and then moving the mouse to the desired location while holding the mouse button down. Release the mouse button to drop the item.

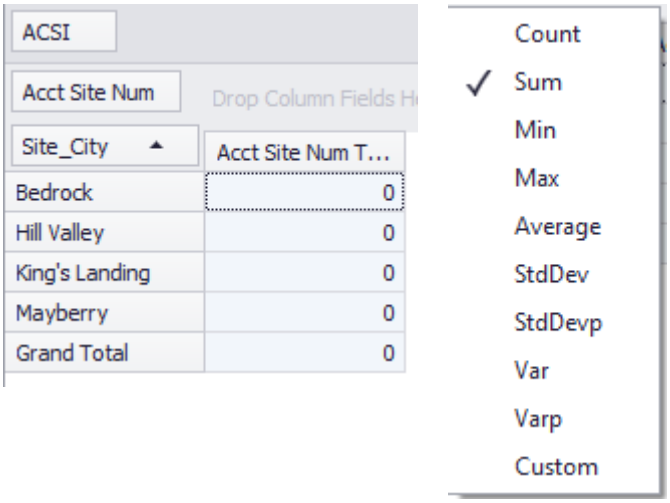


- Click on the button labelled "**Site_City"** and drop it in the area marked "***Drop Row Fields Here.***"

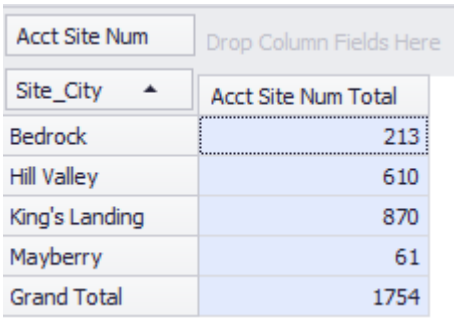
  You should now see a list of all the towns in which you deliver fuel, as shown on the right.



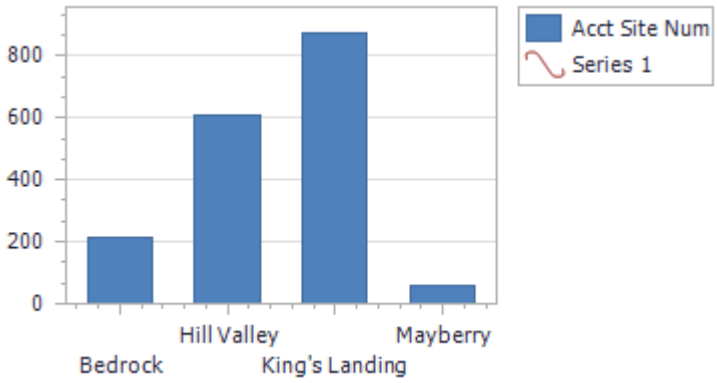
- Now click on the button labelled "**Acct Site Num**" and drop it in the area marked "**Drop Data Items Here**".
- Then click on the button again to see the pop-up list of choices and select the top entry "**Count"**



- Now you should see a count of the number of customers you have in each town, as shown on the right



- Notice the chart at the bottom of the screen! The default type of chart is the Bar Chart but there several other choices such as Pie and Doughnut.
- Click the Save button to save your Pivot Grid.
- But wait, there's more…

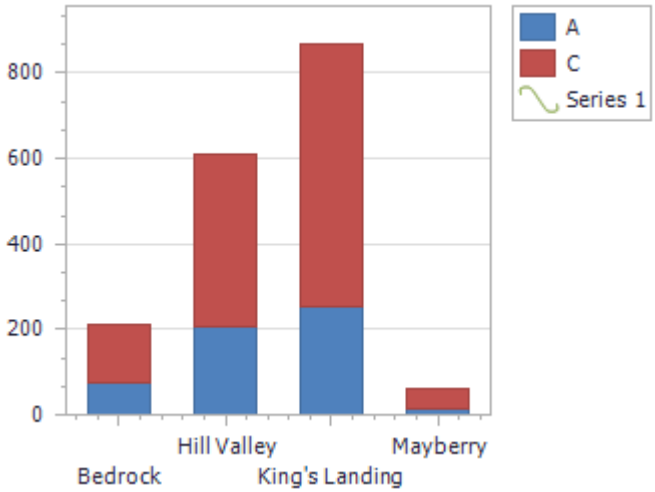


- Click on the button labelled "**ACSI**" and drop it in the area marked "**Drop Column Fields Here**". Now you are seeing the breakdown of "Automatics" vs. Will Calls"

Acct Site Num	ACSI ▲		
Site_City ▲	A	C	Grand Total
Bedrock	73	140	213
Hill Valley	207	403	610
King's Landing	253	617	870
Mayberry	16	45	61
Grand Total	549	1205	1754

- Double-click on a cell to ***Drill-Down*** and see the records that make up that number.

- Experiment with some different charts

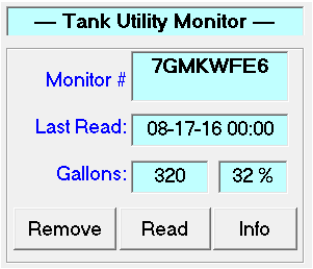


New Feature: Integrated Tank Monitoring

A Tank Monitor can help improve delivery efficiency by providing you with factual fuel levels and usage history. Knowing what was actually in the tank yesterday will help greatly with the goal of achieving optimum drops. It also eliminates the guesswork associated with managing your unpredictable or sporadic fuel users.

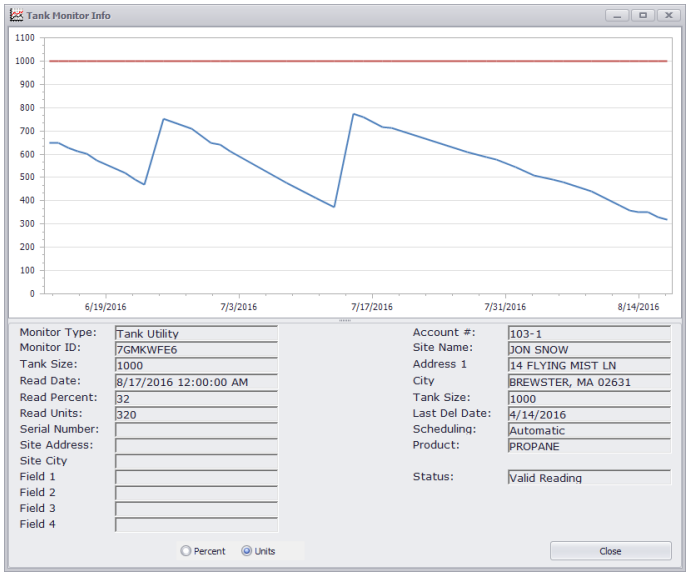
There are a variety of available systems and technologies for monitoring fuel oil and propane. DRM Windows is currently able to interface with 3 brands: EnerTrac, Tank Utility and Wesroc. Each is able to provide you with alerts and reports for monitoring fuel levels. Some even have apps for the homeowners. But most importantly, all are able provide DRM Windows with daily readings. Our software is then able to adjust delivery forecasts.

The customer in this example has 1000 propane gallon tank (usable capacity 800 gallons) which has been fitted with a monitor. The customer's scheduled fuel has been updated to reference the appropriate device #. Notice the presence of the "**M**" located above the fuel gauge that you see on the

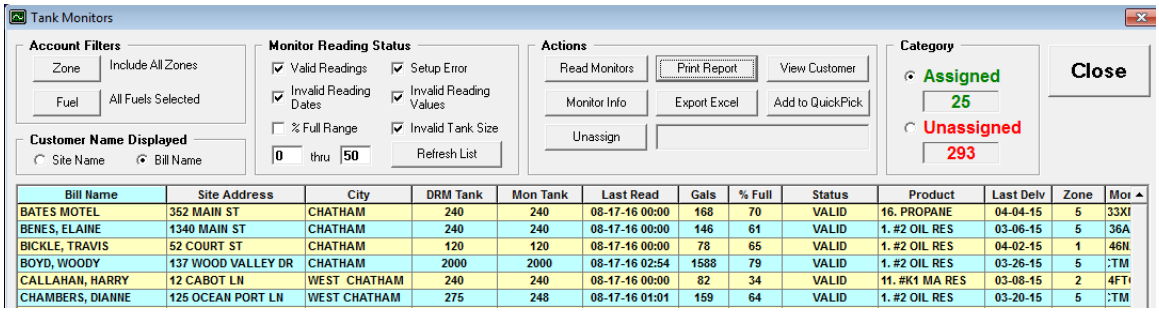


account dashboard screen. The "M" indicates that there is an active tank monitor. The background color is blue to let you know that the last reading was received within the past 48 hours, so the information that you are seeing is considered accurate. You are seeing that his tank would take 480 gallons and he is scheduled for a 600 gal. optimum drop. A red background color means that the last reading received was either invalid or too old and further investigation is warranted.

Clicking on the tank monitor "Info" button shows the reading history.

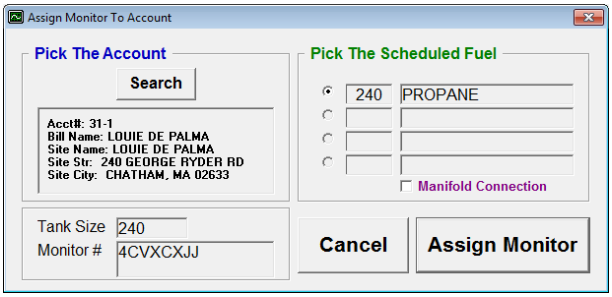


Master Monitor List



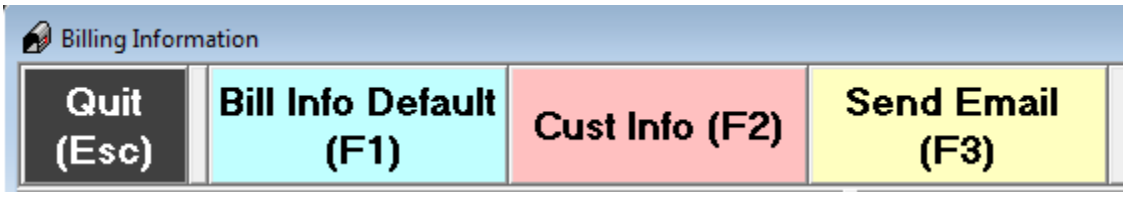
Access the **Master Monitor List** from "**Schedule (F6) / Monitors (F6)**". Here you can report the most recent information for all your monitors. The monitors are divided into 2 category groups: Assigned and Unassigned, and you can only see one group at a time The Assigned list shows monitors that have been linked with customers' Scheduled Fuels, as in the above example. Unassigned monitors have not been linked yet.

Link a monitor by selecting it and clicking "Assign Monitor". The search window will open allowing you to find the correct account by either Name or Account #. Confirm the tank information in DRM Windows matches the monitor and if correct, click Assign Monitor.



There are various filters you can use on your Assigned list. For example you can see monitors in specific zones or those reading below a certain level. Click "Add to QuickPick" to create a QuickPick list for your current list. You can then choose to work with just those accounts from your "Get Customer" screen.

Enhancement to Emailing



You can now send an email message to a customer directly from their account. Previously you could only send emails by also sending a PDF of their statement, invoice or work order. Navigate to the customer's Billing Information screen and select "Send Email (F3)" from the menu to open the Email wizard. You are required to enter something into the "Subject" box. The Body box shows your Default message that you setup in your Email Options. You can keep this or replace it with a new message. Click "Add Attachment" if you want to attach some files such as scanned tickets etc. A note is saved with the account notes to reflect that an email was sent.

Enhancement to Delivery Route Stops Report

There are now several report formats from which to choose that show details for all the stops on a delivery route. This option is available from both the Route Manager screen and the Quick Tik screen. Experiment by printing each of the reports and then decide which format you prefer. You can set that report as the default by entering its number into the Option for "**Printing / Default Delivery Route Report #**".

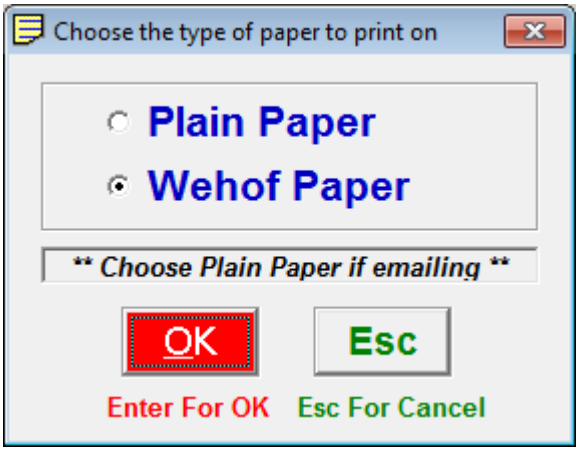
Enhancement to Billing Forms

There are now 2 choices for printing invoices and statements: "***Wehof"*** style and "***Plain Paper"*** style. The Wehof style prints with the layout you are familiar with and is designed specifically for the Wehof LDRM-1 form. The Plain Paper style includes additional formatting that improves the aesthetics when printed on plain paper or saved as a PDF for emailing. Additionally the Plain Paper style will ***always print*** the Company Name & Address block regardless of your default Printing options.

There are 2 ways to print/email statements and invoices: copies for individual accounts can be printed from the Daily Work screen; whereas groups of bills are printed from the Reports screen.

Print Statement from Daily Work

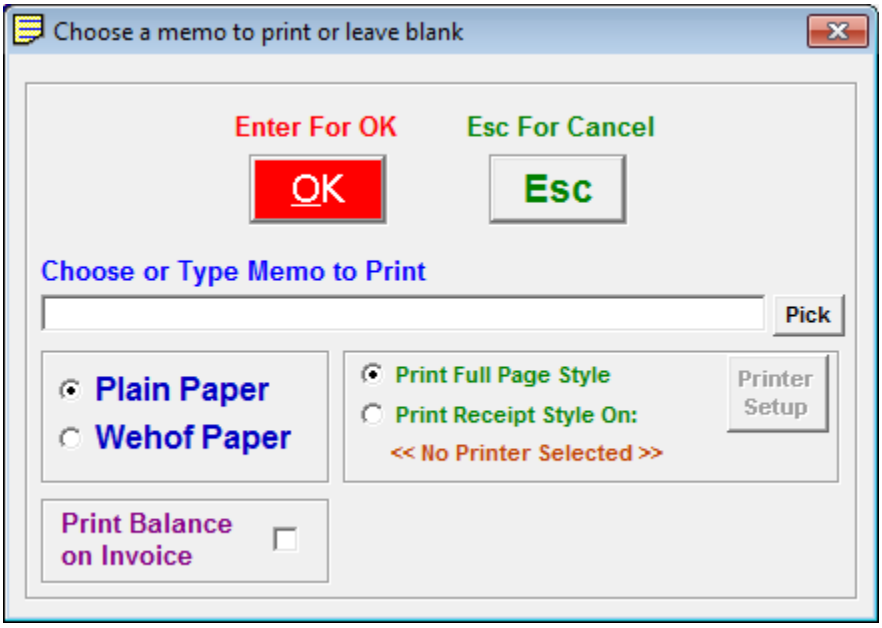
- You will be prompted to select the appropriate style after clicking "Print Stmt".
- The last choice becomes the new default choice for the duration of your session.
- To set a preferred permanent choice, edit the Option for "Printing / Statement Stock – default to Plain Paper".



- It is possible to bypass this prompt (ie. never see it) but this is only recommended if you print exclusively on plain paper. Edit the Option for "**Printing / Ask for Paper in Daily Work**" and change the value to "No".

Print Invoice from Daily Work

When printing the *Full Page Style*, you can select either "Plain Paper" or "Wehof Paper". You may prefer the Plain Paper style if you are emailing the invoice.



Printing from the Reports Menu

There are now 2 choices for each of the 3 types of billing forms. Choose the appropriate one for either Plain paper or Wehof paper.

- **Daily Invoices for Customers – Plain Paper**
- **Daily Invoices for Customers – Wehof Paper**

- **Statement with Detail – Plain Paper**
- **Statement with Detail – Wehof Paper**

- **Statement with Open Invoices – Plain Paper**
- **Statement with Open Invoices – Wehof Paper**

Miscellaneous Changes

1. If a customer has multiple scheduled fuels, the invoice screen now defaults to the first one with a printed ticket.

2. You can now print Budget Coupons and Mailers directly from the Site Information screen.

3. Previously you were limited to no more than 99 of each category of Posting Word (Charge, Credit, Fuel). Now you can have up to 999 of each category, although having *that many* many not necessarily be the best practice.

4. The Fuel Invoice Posting screen now displays the total gallons/litres entered. Useful if you are entering a multi-line invoice for a fleet delivery.

5. The customer's Title is now included with the address that prints on a Label or Envelope.

6. The bug associated with setting the default Account Status has been fixed.

7. By default, if you check the box "Send a copy to Sender" when sending an email, a copy is sent to the sending mailbox. You can now designate that these copies are all sent to a different mailbox. Navigate to "Utilities (F7) / Options (F7)" and edit the record for "Email Settings / Email address for receiving a Copy".

8. The bug that prevented you from being able to delete some Authorize.Net payment profiles has been fixed.

9. Bugs in the Budget Reset screen have been fixed.

10. You cannot make an account inactive if it has any AutoPost transactions scheduled.

11. "Cancelled" has been added to the list of choices for work order status.

12. "No Charge" has been added to the list of choices for work order payment method.