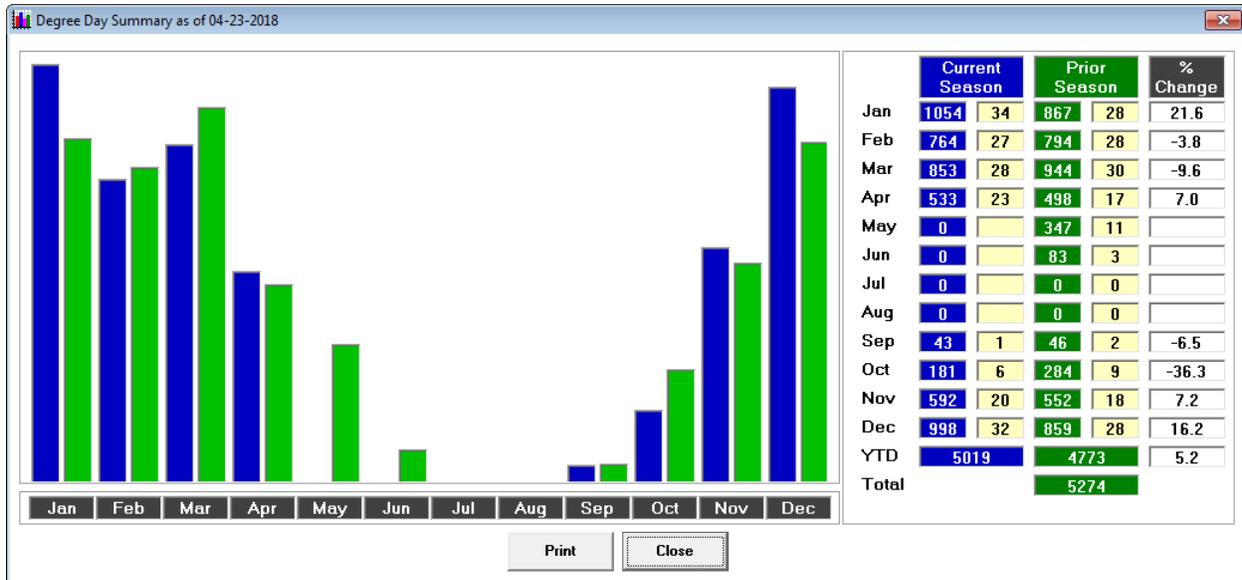




*This document describes the various enhancements and modifications to DRM Windows that occurred between versions 9.1.270 and 10.2.280.*

### New Degree Day History Screen



This screen compares the current heating season with the previous one. Use the chart to see at a glance how each month relates to last year. The blue bars show total monthly degree days for the current year and the green bars represent last year. Use the grid on the right to identify the percentage change for each month in addition to discovering the year to date difference. The yellow column shows the average daily degree days for each month. Open this screen by first opening the “Degree Day” screen and then clicking “History” on the menu.

### New Feature: Auto Pay CC

Check the “Auto Pay CC” box on the Site Info screen to indicate that a customer has given permission to always use their credit card on file to pay for any new invoiced charge.

	Customer	Site
Balance	\$200.00	\$200.00
		<b>Auto Pay CC</b>
Regular	\$200.00	\$200.00

The message shown here will be displayed on their dashboard to indicate this preference. There is also a new field available in Custom Reports called “AutoPayCC.”

At the time you save a new **Regular** invoice, an **Auto-Post** record will be automatically added for this account to pay off the invoiced amount. Be sure to include any discounts given in the invoice. The Auto-Post record is setup as a **One Time** only payment and scheduled on the same date as the invoice. Note that the default credit card on file will be charged.

## New Screen: K-Factor History

Date	Ref	Gallons	Price	K-Factor	Deg Days	Days	Gal/Day
03-15-17	4884	201.6	2.549	2.32	467	17	11.9
04-03-17	8518	148.1	2.529	3.69	546	19	7.8
04-21-17	9386	158.7	2.559	2.41	383	18	8.8
05-17-17	466	94.8	2.589	4.37	414	26	3.6
09-08-17	3710	51.8	2.539	18.34	950	114	0.5
10-19-17	7940	64.0	2.559	7.27	465	41	1.6
11-14-17	8484	154.2	2.609	3.28	506	26	5.9
11-28-17	9437	152.2	2.659	2.19	334	14	10.9
12-11-17	7061	147.5	2.659	2.16	319	13	11.3
12-22-17	7956	223.6	2.739	1.58	353	11	20.3
01-02-18	8449	159.3	2.759	2.20	350	11	14.5
01-12-18	9378	191.3	2.789	1.56	298	10	19.1
01-18-18	9894	101.3	2.789	1.97	200	6	16.9
01-30-18	409	178.0	2.759	3.15	560	12	14.8
02-07-18	741	152.8	2.739	1.69	258	8	19.1
02-13-18	4632	102.6	2.739	1.74	179	6	17.1
02-19-18	5113	101.8	2.759	1.79	182	6	17.0
02-26-18	5297	83.9	2.779	3.08	258	7	12.0
03-06-18	6256	141.5	2.779	2.59	366	8	17.7
03-18-18	4852	146.5	2.779	2.81	412	12	12.2
03-27-18	1298	83.5	2.829	2.96	247	9	9.3

Acct# 31-1  
LOUIE DE PALMA  
240 GEORGE RYDER RD  
CHATHAM, MA 02633

Date Range  
 Ignore Starting Date 4/1/2018  
 Ignore Ending Date 4/24/2018  
 Include All Delivery Dates

Months to Include  
 Jan  Apr  Jul  Oct   
 Feb  May  Aug  Nov   
 Mar  Jun  Sep  Dec

Previously, you could only track k-factor history if a customer was set-up for k-factor scheduling, so if they were on a calendar or elapsed degree day schedule, k-factor history would not be displayed. Now all four scheduling calculations (k-factor, elapsed degree days, calendar days, and gallons per day) are saved with each delivery and displayed as shown above. Use the filters to suppress unwanted months. Click “Export” to export the data to excel. Double-click a record to see the invoice details. To access this screen, first open the “Scheduled Fuel” screen and then click on the heading “—Delivery History—”. Note: in order to see the details for old deliveries, you have to first run a special conversion program, similar to when you reset your YTD units each year. Depending on how many customers you have, it could take several minutes for this program to complete. Until you run the program, you will be reminded each time you open the K-Factor History screen.

## Save Report as PDF

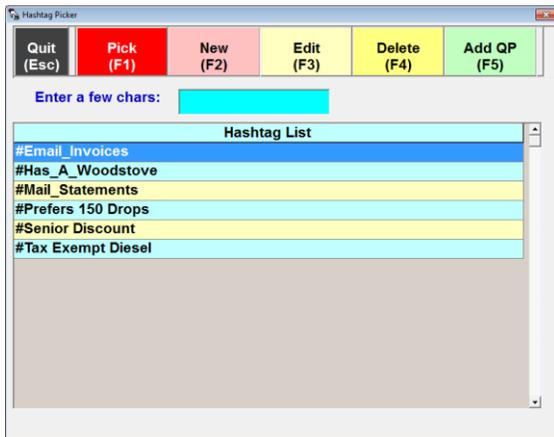
“Save as PDF (F4)” is a new menu item on the Report Preview screen. When you click it the entire report you are viewing is saved as a PDF document and then displayed in a PDF viewer window. You may find saving a PDF copy to be a viable alternative to printing the report on paper. Tip: export your monthly statements to PDF before printing them to have an archive of what was actually mailed. The PDF documents are saved to your Documents folder by default but you can change this location (for example use a NAS Drive) by editing the option for “My Preferences\Default Folder for Saving Exported PDF files”

## New Feature: #Hashtag Bar

#Email\_Invoices #Has\_A\_Woodstove #Mail\_Statements #Prefers 150 Drops #Senior Discount #Tax Exempt Diesel

The #hashtag bar is a section along the account dashboard screen (in the space below the delivery instructions and above the scheduled fuel/service section) where you can place a variety of brief notes or messages called #hashtags similar to the above example. You'll find it to be a convenient alternative to entering a traditional note. You can assign your own color preference to each #hashtag as a way to help it get noticed. You can tag multiple accounts with the same #hashtag and later run a report to identify a particular group.

Move your mouse to an empty area of the #hashtag bar and perform a right-click to display the "Add Hashtag" popup menu.



The Hashtag Picker screen lets you search for and pick an existing #hashtag. Choose "New" to enter a new hashtag, which can contain any series of and up to 20 characters.

Use the "Set Fill Color" button to assign the background color. "Set Font Color" assigns the color of the text.



Choose "Add QP (F5)" to add all accounts who have been tagged with the selected hashtag to your Quick Pick list. You can also use Custom Report criteria and the new "HashtagList" field to report on accounts who been assigned certain hashtags. Each account can have up to 20 hashtags assigned but be aware that there may not be enough room to display them all on the dashboard.



The "Show All" button is displayed in the right-corner of the hashtag bar when an account has additional hashtags. Click it to show the Info screen, or alternatively double-click on any of the displayed hashtags.



Click "Print" to be prompted for the applicable printer.

Remove a hashtag by right-clicking over it and selecting "Remove Hashtag" from the popup menu.

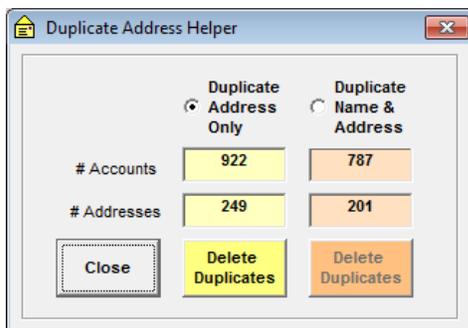
## Improvements to Quick Pick

Quick Pick provides a flexible way to work with groups of customers. For example, you can print statements, labels or letters for each account in the group. You can also post one-time transactions to quick pick members. The first step when working with quick pick is to build the list of target customers and there are several new options to help with quickly identifying and adding groups of customers to target.

- Fuel Delivery Report. The report wizard helps you establish criteria such as specifying a date interval and particular fuel products. The new “Add to QP” option adds all the matching customers to your quick pick list. For example, you want to see a map that shows all the addresses one of your drivers visited yesterday. First setup your fuel delivery criteria for this scenario and then add the matched accounts to quick pick. Next change to the “Site Address” report. Select the option for include “Quick Pick” customers and click “Show Map.”
- Transaction Detail Report. For example, you want to send a letter to anyone who submitted a credit card payment through your Customer Care Portal last year. First use the report wizard to pick the transaction code for “WEB PAYMENT CC” and then lock in your desired dates. Click “Add to QP” to include these customers in your quick pick list. Next launch “Letter Writer” and open the letter you want to send. Select the option to include the “Quick Pick” customers and finally perform the mail merge by clicking “Print All Letters.”
- Upcoming Autopost Report. For example, you want to review each account who has an autopost transaction scheduled for next month. Set the appropriate cut-off date and click “Add to QuickPick.” Next visit the “Get Cust” screen and check the box next to “Use Quick Pick” which in turn filters your account list. Select the first account to display their dashboard screen. When you are ready to move to the next account, simply press the down-arrow key on your keyboard.



- Duplicate Address Helper



If you want to print labels for a target group of customers, using a Quick Pick list is a great way to start as you then have the ability to select unwanted accounts and remove them before printing the labels. Now you can also click “Review Duplicate Address” to see a summary of how many duplicate addresses are included and elect to remove the duplicates. There are 2 kinds of duplicates to consider: address only or name & address. For example, say you have 2 separate accounts with the exact same mailing address but one is listed under “John Smith” and the other under “Jane Smith.” Deleting Duplicate Address Only would remove one of these accounts from your quick pick list, while Deleting Duplicate Name & Address would not remove either one.

## **New Feature: Invoice Terms**

When creating an invoice you can now specify its payment terms which will then print on the invoice. For example, if you enter 7 as the terms, the message “Terms: **Net 7**” along with the **Due Date** will print. If you enter 0 as the terms, the message “Terms: **Due upon receipt**” will print. If the terms field is left blank, no message is printed. You can set the default payment terms for each account in the Site Info screen. An account’s terms is displayed on the dashboard screen above the aged balance section and it is also available as a Custom Report field.

## **New Feature: Tax Exempt Status Enforcement**

Some tax jurisdictions require that you maintain up-to-date exempt documentation for qualifying accounts. For each of your applicable tax exempt fuels, check the choice for “Valid Tax Exempt Status Required.”

**Tax Exempt**

Valid Tax Exempt Status Required

**Tax Exempt**

State Expires:

Federal

Assign the appropriate expiry date within the account billing screen. This date is available as the Custom Report field “DtExempt.”

You will be prevented from taking an order for a fuel requiring a valid exempt status if the account is not in compliance.

## **Improvements to Service Contract tracking**

You possibly have several Posting Words defined to represent each of your contract plans. Edit each of these records and check the box next to “Is a Service Contract.” For each customer with a service contract, add the appropriate plan as a Scheduled Service record as shown here. The color of the Next date field reflects the status of the contract. Green indicates an active plan, Orange when it will expire soon and Red for an expired plan.

<b>Scheduled Service</b>			
<b>Service</b>	<b>WO</b>	<b>Last</b>	<b>Next</b>
<b>1-BURN CLEAN</b>	<input type="checkbox"/>	<b>08-15-17</b>	<b>08-15-18</b>
<b>2-S/C GOLD</b>	<input type="checkbox"/>	<b>07-01-17</b>	<b>07-01-18</b>

Use the Scheduled Service Information report to list all plans that need renewal. First click the Service option and select the appropriate codes for your service contracts. Click on Next Date and set the desired cut-off criteria. Click Refresh on the menu to list all the appropriate customers. If you would like to work on each of these accounts click Add to Quick Pick. Note that you can use Auto Post to setup recurring invoices if you want the service plans to automatically renew each year.

**Service**      **3 Transactions Selected**

**Last Date**      **Ignore Date**

**Next Date**      **Before 05-31-18**

## Miscellaneous Changes

1. You can now pick a different printer when you attempt to print an office note or the Delivery History chart.

2. For each of your delivery zones, the delivery zone maintenance screen can be used to indicate which days of the week are applicable. Tip: instead of checking all five boxes to show Monday through Friday, simply click the button labeled “M-F.”

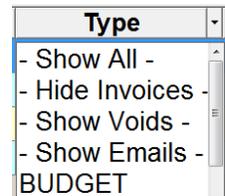
	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
Delivery Days:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
								M-F

3. The Fuel Deliveries report has a new summary section on the last page showing a variety of statistics for the reporting period. In addition to showing how many total deliveries were performed you can see how many customers received deliveries.
4. Customer Rating Enhancement. Previously you could assign a letter “A” through “E” to an account to indicate an account’s rating or credit worthiness. You can now define additional codes from the Customer Rating Maintenance screen (Utilities (F7)/More (F9).” A code can be any letter, number or symbol. Use the description to explain the nature of the code. You can also color-code a rating to help it stand out on the customer dashboard screen.

**Note:** if you are using the Customer Care Portal’s Online Order feature, you can indicate which rating codes are eligible to place orders without paying.

5. You will notice two changes when entering an invoice and using the Parts List. The Part Number field has been moved to the first column. Also any changes made to your searching preference will be remembered for the duration of your session.
6. The Transaction Viewer screen now displays information about when the transaction was originally entered and also last modified.
7. The Fuel Deliveries report has a new option to show “Unscheduled” or “Scheduled” deliveries.
8. The Email Settings option “Default Text in Email Body” has been enhanced to permit a multiple line message.
9. You now have the option to sort a Delivery Route or Quick Tik list by Zip+4.
10. Previously if you attempted to export a filtered Saved Ticket list to excel, all the records would be exported instead of only the filtered list. This issue has been corrected.
11. You can now perform a Fuel Inventory adjustment if there also happens to be more than 32,000 units pending.

12. You now have the ability to quickly prevent Invoice type notes from being displayed along with other account notes. Simply click the filter arrow next to “**Type**” from the notes heading bar and select the choice for “Hide Invoices.” The invoice notes will be hidden for the duration of your session unless you choose the option for “Show Invoices.”



13. The Account Lookup (aka “Get Cust”) screen no longer has the search option choices for “Starts With” and “Contains”. Instead all searching is done using the “Starts With” approach. For example, the customer “John Smith” would be displayed in the list as “Smith, John” and you might type “Smi” to locate his record. The ability to perform a “Contains” search has not gone away as it is still available from the filter screen. For example, right-click on the Site Name column to see the filter and then type “John” into the Contains field. Click OK to filter the list down to only accounts that contain the word “John” somewhere in their name.
14. Two new fields have been added to Custom Reports to help report on accounts with pending Auto-Post transactions.
- **APChrg** shows how many Auto-Post charge records are scheduled for an account.
  - **APCred** shows how many Auto-Post charge records are scheduled for an account.
15. **Transaction Audit** is a new report that shows details about when a transaction was posted to an account. Use the various filters to drill-down to a specific situation, such as report all the transactions that were voided by a particular user.
16. When you set-up an account for a business, usually the business name is entered into the Last Name field and the First Name field is left empty. In this situation the Site Name would show a trailing comma in the Account Lookup screen. This issue has been fixed.
17. An issue that may have allowed two users to add the same saved ticket to a different route has been corrected.
18. Previously if you were viewing an invoice note from the “View Trans” screen and pressed the down-arrow key, the next invoice in the list would be displayed. This issue has been corrected and now the arrow-keys move the cursor around the note details box.
19. When you are post a Budget or Prepay fuel delivery for a non-valid price contract, the default behavior is to automatically switch the category to Regular. You can bypass this behavior with the option “Posting/Force invalid fuel contracts to post as Regular.”
20. The “Fuel Deliveries Totals and \$” report now has an option to show or hide the type of fuel that was delivered.
21. Previously you were unable to email an overdue notice to the selected account. This has been resolved.
22. You will be prevented from deleting a Saved Ticket from the customer dashboard if it has already been assigned to a Route. The alert message will reference the applicable Route #.

## Enhancements to Fuel Pricing

Several new features have been added to provide additional flexibility and control within the scope of fuel pricing for customers. Each account can now have both a contract and off-contract price defined. Market pricing allows you to easily make pricing adjustments to compete with dealers in certain areas. Quantity pricing allows you to discount prices for larger orders. These new features all play an integral role with our new [Online Ordering](#) module via our [Customer Care Portal](#).

- **Contract vs Off-Contract Pricing**

— Pricing Setup —

Market:	<input type="text"/>	<input type="button" value="Pick"/>
Price:	R +/- - .15	<input type="button" value="Active"/>
Discount:	<input type="text"/>	

The price shown here refers to the off-contract price and is the price the customer will pay when there is not a valid price contract in effect. Its status displays “Active” if this is the price that will be used or “N/A” if instead there is a valid contract price. In this case the price would be the Retail price for the applicable Market less 15 cents. (Note: we will discuss *Markets* later.)

A valid contract price always over-rides the off-contract price. Its status will show “Active” when it is valid, in which case the off-contract price would show as “N/A”. To be valid, the contract price has to be linked to either a number of gallons purchased which have not been used up yet, or defined for a current timeframe. The example shown here shows both gallons and dates, which is also fine, but only one or the other is required.

— Contract Pricing —

R/C/F:	F	2.59	C	<input type="button" value="Active"/>
- Contract Gallons -				
Purchased:	900	738.4	:Remaining	
Last Year:	850	Use Dates:	<input checked="" type="checkbox"/>	
Starts:	09-01-17	04-30-18	:Ends	

Any of these four status messages represent a non-valid contract, causing the off-contract price to be in effect:

- “Used Up” - all the purchased gallons have been sold
- “Future” - the contract is for a future timeframe
- “Expired” - the contract timeframe is in the past
- “N/A” - there is no timeframe indicated nor purchased gallons

- **Meter Ticket Screen Pricing**

The Best Fuel price will be automatically recalculated and displayed whenever you adjust the delivery date or fuel. If you have the Quantity Pricing option turned on, the Best Price will also be recalculated when you adjust the quantity or dollar amount ordered, but only for a Will Call customer. You may see a “Contract Price” or “Special Price” message to the left of displayed price. A special price is considered to be a non-contract price that is anything except base retail or “R-0.00”.

Gallons:	100.0
Special Price:	2.049

Market:	Default		
Cost:	1.699	Retail:	2.199
Price Code:	R - .15	Best \$	2.049
Quantity Auto Adjust is OFF			
0 - 99	2.299	400 +	1.999
100 - 199	2.199		
200 - 299	2.149		
300 - 399	2.099		

Click the option for “Price Info” to see how the best price was determined. In this example, \$2.049 is the best price because the customer has a special price of 15 cents below retail. This customer is associated with the Default market for which the Retail Base price is \$2.199. Notice the Quantity Auto Adjust feature is turned off so the best price is not based on the number of gallons ordered.

- **Pricing Manager**

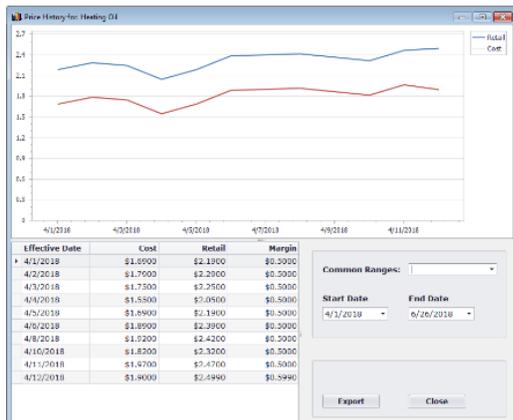
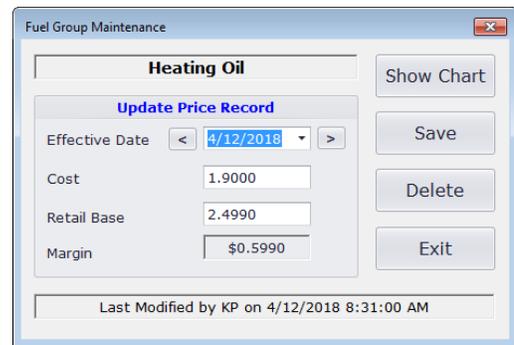
The Pricing Manager screen provides access to all pricing related activities. From here you can enter price changes, print price sheets, and manage customer-specific pricing. Open the Pricing Manager from the **Degree Day** screen and selecting “**Set Prices**” from the menu.



The main Pricing Manager screen is comprised of a menu and two panels. The left-side panel shown here on the left shows the prices in effect as of the “**Effective Date**” displayed. Use the side arrows as a convenient way to change the date displayed.

Click on the **Edit** button for the selected fuel record you wish to change.

The Price Maintenance screen allows you to change either or both the **Cost** and **Base Retail** price for the fuel. The difference between **Cost** and **Retail** is displayed as the **Margin**. Information pertaining to the last price edit for this date is shown at the bottom of the screen. The example here shows that a price has previously been entered for 4/12/2018 and consequently the edit message displays “**Update Price Record.**” If it was a new price the message would display “**Add New Price.**”

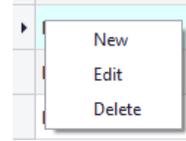


Click “**Show Chart**” to open the price history window. You can control the interval displayed by adjusting the Start and End dates.

Click “**Export**” to export the price history to Excel

## Add or Edit a Fuel Group

From the left-side of the list of Fuel Groups, perform a right-click to display the three edit options. Select **New** to setup a new Fuel Group. Select **Edit** to view the details for the selected Fuel Group. Select **Delete** to remove an unwanted record.



### Markets

A Fuel Group is associated with at least one market. Each market can be setup with its own pricing. A customer can be linked to a specific market for each of their scheduled fuels. The default market will be automatically used in the event when a market is not defined for a customer. When you specify which markets are applicable for the fuel group, one of them must be assigned as the Default market.

### Products

The Products are all the Fuel Posting Words that get their pricing from this Fuel Group. In this example, there are seven codes representing various tax configurations for #2 Fuel Oil. The associated taxes will vary but the base cost and retail prices are the same.

### Pricing Tiers

Assign up to 8 tiers to handle volume discounts.

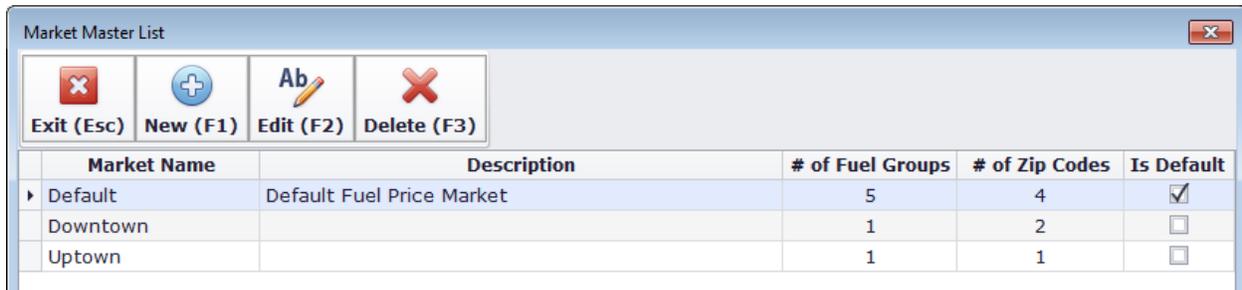
## Pricing Table

The Pricing Table is displayed in the right-side panel of the Pricing Manager screen. It lists all the prices in effect for each applicable market. Use the Market and Fuel Group filters to control what prices are displayed in the table. Choose **Print** from the menu to print the corresponding price sheet.

Fuel Group	Market	Effective	Locked	Retail Base	Range 1	Range 2	Range 3	Range 4	Range 5	Range 6	Range 7	Range 8	Edit
▼ Clear Diesel					1 - 30000								
	Clear Diesel	Default	4/1/2018	1.8990	1.8990								...
▼ Dyed Diesel					1 - 30000								
	Dyed Diesel	Default	4/1/2018	2.2390	2.2390								...
▼ Heating Oil					1 - 99	100 - 149	150 - 199	200 - 249	250 - 299	300 - 30000			
	Heating Oil	Default	4/12/2018	2.4990	2.4990	2.4490	2.3990	2.3490	2.2990	2.2490			...
	Heating Oil	Downtown	4/12/2018	2.2990	2.4990	2.2490	2.1990	2.1490	2.0990	2.0490			...
	Heating Oil	Uptown	4/12/2018	2.5990	2.4990	2.5490	2.4990	2.4490	2.3990	2.3490			...
▼ Kerosene					1 - 30000								
	Kerosene	Default	4/1/2018	3.1990	3.1990								...

## Markets

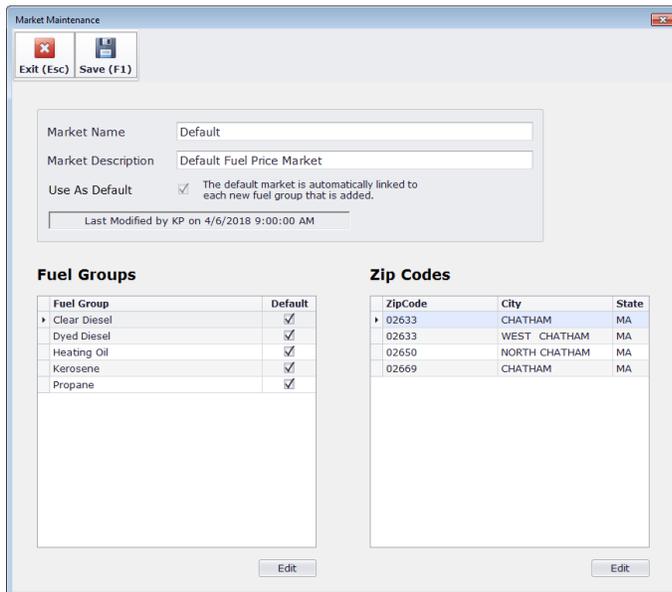
Markets can be used to support a variety of complex pricing scenarios. A market could be defined for a specific region where pricing is more competitive. For example, you can easily adjust the price for a specific market to match a competitor's price-drop. Markets could also be used to manage propane usage pricing tiers. It is common for propane to be priced according to annual consumption. A market would be created for each price point. The Customer Pricing Manager could be used to help group accounts into the correct tier. Markets can also be associated with geographic areas defined by zip-codes. Note: zip-code based pricing is currently only utilized for online ordering from the Customer Care Portal.



The screenshot shows a window titled "Market Master List" with a toolbar containing icons for Exit (Esc), New (F1), Edit (F2), and Delete (F3). Below the toolbar is a table with the following data:

Market Name	Description	# of Fuel Groups	# of Zip Codes	Is Default
Default	Default Fuel Price Market	5	4	<input checked="" type="checkbox"/>
Downtown		1	2	<input type="checkbox"/>
Uptown		1	1	<input type="checkbox"/>

The **Market Master List** displays all your available markets. Double-click on a record to edit the details or choose **New** from the menu to set-up a new market.



The screenshot shows a window titled "Market Maintenance" with a toolbar containing icons for Exit (Esc) and Save (F1). The form contains the following fields and lists:

Market Name:

Market Description:

Use As Default:  The default market is automatically linked to each new fuel group that is added.

Last Modified by KP on 4/6/2018 9:00:00 AM

**Fuel Groups**

Fuel Group	Default
Clear Diesel	<input checked="" type="checkbox"/>
Dyed Diesel	<input checked="" type="checkbox"/>
Heating Oil	<input checked="" type="checkbox"/>
Kerosene	<input checked="" type="checkbox"/>
Propane	<input checked="" type="checkbox"/>

**Zip Codes**

ZipCode	City	State
02633	CHATHAM	MA
02633	WEST CHATHAM	MA
02650	NORTH CHATHAM	MA
02669	CHATHAM	MA

The **Market Name** is displayed in the Pricing Table and prints on the Price Sheet. It is limited to 20 characters at most.

The **Market Description** is optional and can be used to enter extra information about this market.

One of the markets must be flagged as the **Default Market**, which will be automatically assigned to any new fuel group you add.

Edit the list of **Fuel Groups** that may be sold within this market.

If you accept online orders from the Customer Care Portal, enter the list of zip codes that make up this market.

## Editing a Market Specific Fuel Price

Market Base Price	Price	Delta
0 - 99	2.4990	0
100 - 149	2.4490	-0.0500
150 - 199	2.3990	-0.1000
200 - 249	2.3490	-0.1500
250 - 299	2.2990	-0.2000
300 - 30000	2.2490	-0.2500

When you save a new price for a Fuel Group, a Market Price record is created for each of its associated markets.

The Retail Price for the Fuel Group is displayed as the **Price Group Base** amount.

The **Market Base Price** is the base price charged to automatic accounts. A customer-specific Retail or Capped Contract price code would be based on this price. You can change this price directly or adjust it with a **Delta** amount. The delta is the difference between the Price Group Base and the Market Price (similar to how the margin is the difference between Cost and Retail).

You will see 1 to 8 Volume Base prices depending on how many price tiers are defined for this fuel group (this example shows 6.) The Volume Prices are used by pricing that is performed in the Meter Ticket screen and also by Online Ordering from the Customer Care Portal.

**Note #1:** the market price record is automatically created when you enter a new Fuel Group price and it uses the same deltas from the previous price record. In this way, you will find that often you will not need to manipulate pricing at the market level once the appropriate deltas have been established.

**Note #2:** check the box next to "**Lock Price**" if you want to freeze a price for a particular market and not have it automatically change when the Fuel Group price changes.

## Manage Customer Pricing



Choose “**Cust Pricing**” from the menu to open the Customer Pricing Manager screen. The initial list shows all scheduled fuel records but you can use the various filter options to refine the list. Double-click on any record to view the account information for the selected row. Choose “Export” to export the list to excel.

Scheduled Fuel Price Information: 40 Rows

Exit (Esc) Panel (F1) Refresh (F2) Print (F3) Export (F4) Add to QP (F5) View Info (F6) Update (F7)

**Filter Panel**

**Date of Last Delivery**

Ignore Starting Date 4/26/2018

Ignore Ending Date 4/26/2018

Ignore Last Delivery Date

**Categories**

Regular

Budget

Fuel Assist.

Prepay

**Scheduled As**

Auto

Call

Service

Inactive

**Pricing**

Off Contract Price Amount

Contract Price

Customer Market Specified Y  N

**Contract Criteria**

Start Date Ignore Dates

End Date Ignore Dates

Units Purchased

Units Remaining

Price Contract Status Code

**Customers to Include**

Apply Filter All Selected

**Additional Criteria**

Filter by Fuels All Selected

Filter by Zones All Selected

Filter by Market All Selected

Filter by Fuel Group All Selected

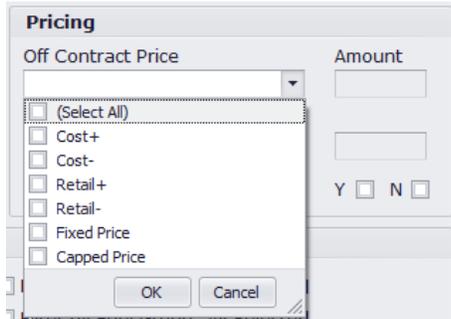
Acct #	Customer	Address	City	Fuel	Fuel Group	ACSI	Last Delv	RBFP	Off-Contr Price	Market	Contr Status	Contr Price
18-1	COSTANZA, FRANK & ESTELLE	90 SEAVIEW ST	CHATHAM	1. #2 OIL RES	Heating Oil	A	3/22/2018	R	R-0.00	Default	N/A	R-0.00
18-2	COSTANZA, GEORGE	847 ORLEANS RD	NORTH CHATHAM	1. #2 OIL RES	Heating Oil	A	1/1/2018	R	R+0.00	Default	N/A	
1513-1	WHITE, WALT & SKYLER	75 OLD MAIL RD	NORTH CHATHAM	1. #2 OIL RES	Heating Oil	A	3/7/2018	B	R-0.00	Default	N/A	
1023-1	STARLING, CLARICE	48 OLD ACADEMY RD	CHATHAM	1. #2 OIL RES	Heating Oil	A	2/27/2018	R	R-0.00	Default	N/A	
1329-1	DUNPHY, PHIL & CLAIRE	407 OLD HARBOR RD	CHATHAM	1. #2 OIL RES	Heating Oil	A	2/27/2018	R	R-0.00	Default	N/A	
33-1	LOCKE, JOHN	450 MAIN ST	CHATHAM	1. #2 OIL RES	Heating Oil	A	3/12/2018	B	R-0.00	Default	N/A	
23-1	GRIFFIN, PETER & LOIS	62 ANNE BLAIR'S RD	NORTH CHATHAM	1. #2 OIL RES	Heating Oil	A	3/1/2018	R	R-0.00	Default	N/A	
107-1	BUNDY, AL & PEG	1040 MAIN ST	CHATHAM	1. #2 OIL RES	Heating Oil	C	3/21/2018	R	R-0.00	Default	Expired	F 3,529 P
36-1	BENES, ELAINE	1340 MAIN ST	CHATHAM	1. #2 OIL RES	Heating Oil	A	3/6/2018	R	R-0.00	Default	N/A	
40-1	LOUDON, DICK & JOANNA	70 QUEEN ANNE RD	CHATHAM	1. #2 OIL RES	Heating Oil	A	2/6/2018	R	R-0.00	Default	N/A	
17-1	MONTOYA, INIGO	713 CROWELL RD	NORTH CHATHAM	1. #2 OIL RES	Heating Oil	A	3/18/2018	B	R-0.00	Default	N/A	
38-1	HARPER, CHARLIE	31 NONANTUM LN	CHATHAM	1. #2 OIL RES	Heating Oil	A	3/1/2018	R	R-0.00	Default	N/A	
24-1	IGNATOWSKI, JIM	61 SCHOOL ST	CHATHAM	1. #2 OIL RES	Heating Oil	A	3/18/2018	R	R-0.00	Default	N/A	
39-1	HOULIHAN, MARGARET	38 WILKEY WAY	CHATHAM	1. #2 OIL RES	Heating Oil	C	3/20/2018	R	R-0.00	Default	N/A	
103-1	SNOW, JON	409 MAIN ST	CHATHAM	1. #2 OIL RES	Heating Oil	A	4/14/2018	R	R-0.00	Default	N/A	
27-1	MONTANA, TONY	251 CROWELL RD	CHATHAM	1. #2 OIL RES	Heating Oil	A	3/18/2018	B	R-0.00	Default	N/A	

## Filtering

You can use various filter combinations to display only the accounts you are interested in. Remember to choose “**Refresh**” from the menu to apply the criteria and regenerate the list.

- **Last Delivery Date Criteria**  
Limit the list to only accounts whose last delivery occurred either before or after the specified cut-off date. Use both filters to limit the list to accounts where the last delivery occurred during the specified date range. The default is to ignore the last delivery date.
- **Scheduling Criteria**  
Check the appropriate box if you only want to show Automatic or Will-Call accounts.
- **Scheduled Fuel Criteria**  
Check the box next to “Filter by Fuels” to open the fuel picker screen and then select the appropriate fuels.
- **Delivery Zone Criteria**  
Check the box next to “Filter by Zone” to open the Delivery Zone picker screen and then select the appropriate zones.

- **Off-Contract Price Criteria**



Click the drop-down arrow to see the list of price code choices and check the relevant codes.

Note: if you only choose a single item (for example Retail -), you will also be able to enter an amount in the amount field. In this way you could list everyone coded as “R minus .05”. Later you will see how it is possible to perform a mass-update and change everyone from “R minus .05” to “R minus .06”

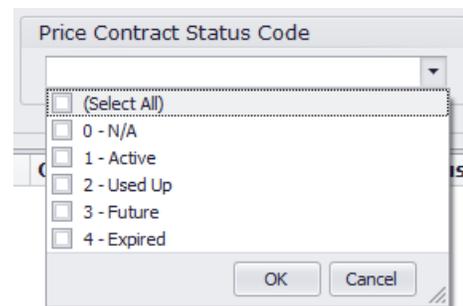
- **Contract Criteria**

Similar to how you can search for specific off-contact prices codes, you can use the contract price drop-down to focus on contract pricing codes.

You can use the contract fields to filter by contract date range or remaining gallons.

The Contract Status Code filter allows you to list contracts that fall within one of the five contract states

- An **Active** contract is in effect today
- A **Used Up** contract means units were purchased but all have been used
- A **Future** contract has not started yet
- An **Expired** contract has ended
- **N/A** refers to a non-valid contract, which is not associated with either purchased units



- **Market Criteria**

Check the box next to “Filter by Market” to open the Market picker screen and then select the appropriate markets.

Note: because assigning a market to an account is optional (the default market for the fuel group is used when one is not assigned), you may want to see who has or has not been assigned a market. The Yes /No checkboxes next to “Customer Market Specified” can be used for this.

- **Fuel Group Criteria**

Check the box next to “Filter by Fuel Group” to open the Fuel Group picker screen and then select the appropriate fuel groups.

- **Additional Criteria**

In the section for “Customers to Include” check the box next to “Apply Filter” and the criteria builder screen will open.

## Mass Updating

Mass updating allows you to adjust the pricing codes for a group of accounts in a single step. You can change their Market or Off-Contract Price Code, in addition to resetting Fuel Contracts.

First filter the list to identify only the accounts you want to update. ***Note that the objective is to set all these accounts to the exact same value.*** Click “Update” from the menu to open the Mass Update screen.



Pick the type of item you wish to update. You can only work with one type at a time

A screenshot of a software dialog box titled 'Mass Update'. The main heading is 'DRM PRICING MASS UPDATE'. Below the heading, it states 'There are 40 customers selected for update'. The dialog is divided into three sections, each with a checkbox:

- Set Market to:** A dropdown menu currently showing 'Default'.
- Set Off-Contract Price to:** Includes four sub-fields: 'R/C/F' with a dropdown set to 'R', '+/-' with a dropdown set to '+', 'Amount' with a text input field containing '0', and 'Method' with a dropdown menu.
- Reset Price Contract:** Includes four checkboxes: 'Reset Dates', 'Reset Units', 'Reset Price', and 'Reset P to R', all of which are currently unchecked.

At the bottom of the dialog are two buttons: 'Cancel' on the left and 'Perform Update' on the right.

### Set Market

Select the appropriate market from the dropdown.

### Set Off-Contract Price

Assign appropriate codes to the four fields depending on the pricing calculation.

### Reset Price Contracts

Check which of the 4 steps to perform.

Click “**Perform Update**” to make the change permanent.