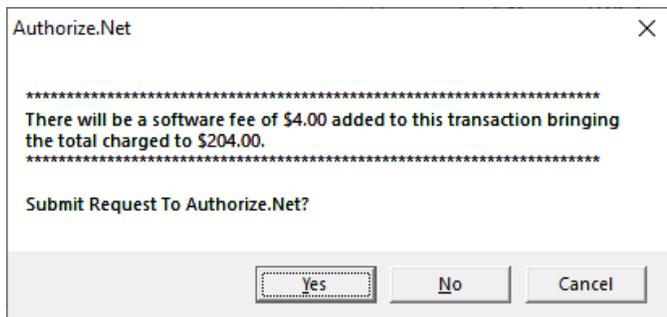


*This document describes the various enhancements and modifications to DRM Windows that occurred between versions 11.1.400 and 11.1.410.*

**Enhancement to Authorize.Net**

You can now setup a software fee to be automatically added to certain credit card transactions. The fee can be set according to the type of card charged and can be either a % of the desired amount to be processed or designated as a flat amount. *\*Note that before implementing this practice you should consult with your state's consumer protection laws.* In some states such as New York this practice is not legal.

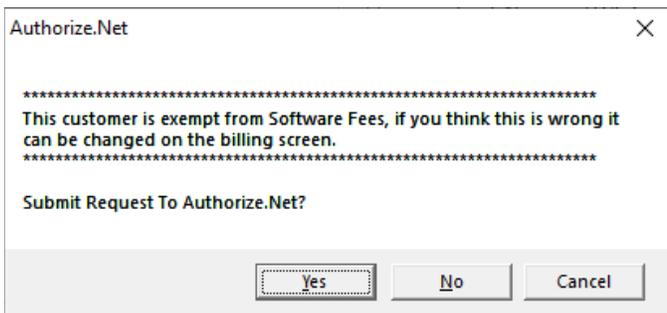
For example, a customer has a \$200 balance and wants to pay it off via software to their Visa card on file. You have established that Visa transactions incur a 2% software fee and advised the customer as such. Enter \$200 into the amount field and upon clicking "Submit Request" this prompt will display.



The card will be charged \$204 and a Software Fee line-item charge of \$4.00 will be added to the transaction

In your tax jurisdiction, if such fees are subject to sales tax then the appropriate tax amount will be added to the amount charged.

A customer can be made exempt from ever paying a fee. In their Billing Info screen, set the "CC Fee" field to "N". This can only be done by a user with "Credit Hold" authority. Changing this value is an audited event.



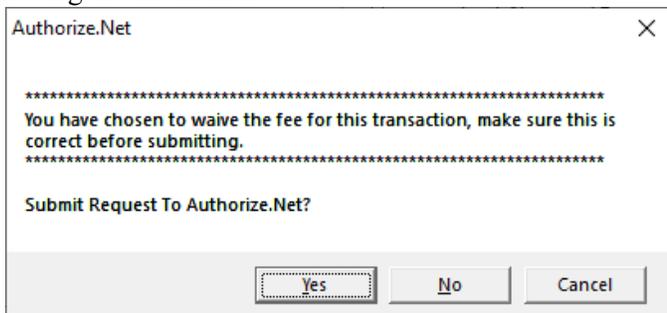
This message is displayed when an exempt account is charged.

If a customer is not exempt, it may be possible to waive the fee at the time of processing the payment. This can be done by removing the check next to "Add Software Fee".



Note that only users with the authority to Waive Fees can do this.

This is the message that is displayed when a fee is waived.



If you allow your customers to make payments via the Customer Care Portal, they will be clearly informed of any associated fees prior to submitting their payment and the receipt will detail the fee. Any customers exempt from fees will not incur any fees when paying via the portal.

A Void transaction performed on the same day cancels the entire payment including the fee amount.

A Return transaction will initially show the full amount (including the fee) that was charged. Just like with any return you can adjust down the amount refunded. So for example in the Visa scenario above, let's say you wanted to refund the fee. You would initiate a Return and then adjust the amount to be refunded to \$4.00. Following that you would need to post a credit amount of \$4.00 for the convenience fee to reverse that charge that was added at the time of the payment. Note that in the event the full amount is refunded (\$204 in the above example) then the convenience fee credit is automatically posted, saving you that extra step.

If this is a feature you wish to use, please reach out to us for our assistance with setting it up.

### **New Feature: Return Parts**

This new process will help you return parts to your supplier. To start the process, select “**Return (F8)**” from the Inventory menu. Create a new list and add the parts to be returned and adjust the quantities as necessary. Enter a note to identify the supplier. Click “**Return**” when ready and select the date the items were returned. The on-hand inventory for each affected part will be reduced with a “RETURN” transaction. Use the Inventory Transactions report to list all returned parts over a period.

### **Enhancement to Customer Auditing**

Any changes to the following key fields are now audited:

- Name and address for both billing and site
- Account #
- CC Fee

You can use one of the report wizards to show all changes for specified fields over a period. Or you can quickly see the history of changes for the active account by clicking “**Audit Report**” from the menu of the Billing and Scheduled Fuel screen. Press the “**F10**” key on the Site screen to accomplish this as there is no room for another menu button!

### **Miscellaneous Changes**

1. Within the Site Info screen the Budget YTD field is supposed to show the total payments made to date for the current budget cycle. Sometimes the amount is wrong as perhaps someone typed over it by mistake. Now instead of grabbing the calculator click the new “**R**” reset button located on the right side and the correct total will be calculated and updated.  

2. In the last revision we added a new report to show any errors that happened during AutoPost. Usually these are credit card payments that were not approved. Now you can choose to add the affected accounts to your Quick Pick list and then create a workflow to focus on that group.

3. If a customer has a fuel contract based on units (gallons or litres) purchased, the number of units remaining are now clearly displayed in the Meter Ticket screen.
4. In order to make an account inactive, the user must now be a member of the “Credit Admin” role. Visit the User Maintenance screen to set this permission.
5. A new “**Inventory Summary**” section has been incorporated into the Post Totals batch report summarizing units delivered by product and truck. You should find this to be useful information for helping cross-check your posted work.
6. When viewing the details of a batch, you will see a new column to the right of the category that shows the description of the first line item. Now for example, instead of just knowing it was a fuel invoice you can see what the product was, or what type of payment the credit was.
7. Three new propane uses have been added to help identify agricultural uses at a more granular level: Grain Drying, Greenhouse, and AG Barn.
8. If a user has been granted access to Reports, they can run all the built-in reports that are available to them. Previously, they would also have been able to access Custom Reports. However, now you can control access specifically to Custom Reports from the User Maintenance screen.
9. The SearchSort field is now 50% bigger! You can now enter up to 15 characters.
10. The Route Builder screen now shows the tank level % reading for any account fitted with a tank monitor. We’ve also spiced up the Urgency rating with some color. The Urgency is percentage of Estimated Need compared to Optimum Drop. Urgency above 100 suggests the delivery is overdue and these are colored Red. Stops with an urgency above 50% are colored Orange and any below 50% are colored Green.
11. If you use the Customer Care Portal you are likely familiar with seeing an occasional alert about pending orders or access requests when you sign in or out of DRM. Now you will see a similar alert if there are pending Service Requests.
12. The Customer Information report is a one page report generated by clicking “**Prt Cust (F10)**” and shows important details for an account. The **Last Clean Date** is now included.
13. When a customer’s home is sold and the new homeowner wishes to do business with you, it’s common to create a new account to keep the financials separate. Equipment installed and past service history may be useful information to have and you now have the ability to copy this from one account to another. From the account with the service information open the “**Service (F4)**” screen and click “**Copy to Site (F8)**”. Then pick the account for which you want to have a copy of the history.
14. In the Meter Ticket screen, if you are using Volume Pricing and want to set the order to a specific dollar amount, the unit price is automatically adjusted to the best price for the calculated gallons. You can now override this by checking “**Skip Best Price**” and then setting the unit price as desired.

	Price:	3.939
Skip Best Price	<input checked="" type="checkbox"/> Total:	500.00