

Accounting & Technical Support For Petroleum Marketers!

Assorted patches from May-June 2005:

- The Daily Report can now email as a .PDF attachment. This produces a more readable file that when we send as text. It also allows the use of three columns without degrading the viewing experience.
- The Customer Maintenance C screen – CUSTPROD – has been patched to use the standard product lookup module. Previously, this had its own internal code, code that did not support all the fancy ways of looking up products native to most of the rest of the system.
- The Salesman sort code utility is redone to support the alternate Salesman that can be set up for lubes, fuels or cardlock from the COMM screen, off the Customer S screen. Jobbers who use this alternate had no way to track how their accounts were set up.
- An Alternate Sales Rep field was added to the Customer F screen. Other than being supported by the sort code utility just mentioned, this field is for information only. The initiating jobber will use it to store the original sales rep; after a year they transfer the account to a “maintenance” rep.
- One of our RxWeb accounts asked that new accounts default to Web ON. This jobber wants all accounts on the web and would forget to flip the flag in Modify mode after adding the account. With this patch, new accounts are added as ON; one can then turn that OFF in Modify mode if needed. Accounts with a billing master are an exception, staying OFF by default.
- A jobber asked us to keep miscellaneous inventory items out of the history files for Trucks and Drivers. Fees and credits were distorting the Driver Analysis. We may tweak this to post dollars, but not quantities. Contact Bill if you are seeing distortion in either the Truck Analysis or the Driver Analysis.
- A sort code utility was added for Web On. This is helpful for analyzing who's on the Web, relative to who OUGHT to be on the Web. That is, it helps the jobber spot active accounts with the Web flag at OFF and inactive accounts with the Web flag still turned ON.
- The mail log was upgraded to be able to resend a PDF file. This is at 5, 65, 6. Previously one could resend an item only if it went out as text.
- The DTN import was patched to look for product matches WITHIN the incoming product. Previously we matched the first 12 bytes; that fails when the incoming name

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is really verbose. Now we translate based on whether a given string of characters exists somewhere within the incoming product name.

- In the Excel dump for Open A/R (TP052) we added a column for Days_Late, which is the difference between the Due Date and Today, or the system date when the file is made. This explicit calculation reduces mental gymnastics for the user.
- For the same reason (see prior bullet), we added a Days Late type of column to the Customer A/R Report (3, 30, 2, 11) when in detail mode. Values like -5 indicate it is five days until the due date. Values like +3 indicate the item now stands at three days past due.
- We added a C/L function designed to email on demand a report similar to the one at 3, 31, 11, 1, or the Card List by Customer --- if you could run that for both Authorized Products and Vehicles at the same time. The idea is to be able to email a customer a quick snapshot of all their cards. In systems that support .PDF, that's how it mails.
- We have also taken the C/L List just mentioned and made it available as a report to be posted once a week on the RxWeb service. That way, a customer can always pull up a summary snapshot of their cards without bugging you!
- In the Card Maintenance screen for Vehicle cards we have added a qualifying flag to go with the Max Gallons field. This flag has values for (per) Transaction, Day, Week and Month. This allows them to store how they encoded that card. This field was also added to the C/L List just mentioned.
- Card Ranges maxed out at 90 entries – 3, 31, 10, R. We expanded that to 135.
- Best Buy was tweaked to discard Supplier Pricing older than five days on fuels. This keeps outdated info and discontinued suppliers from tainting the ranked results.