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[for our January 13th Webinar](#)

We hoped that COVID would be in the rear view by now, and we're not there yet, but thankfully, for most of our customers, it's been a very busy and productive year despite the remaining restrictions.

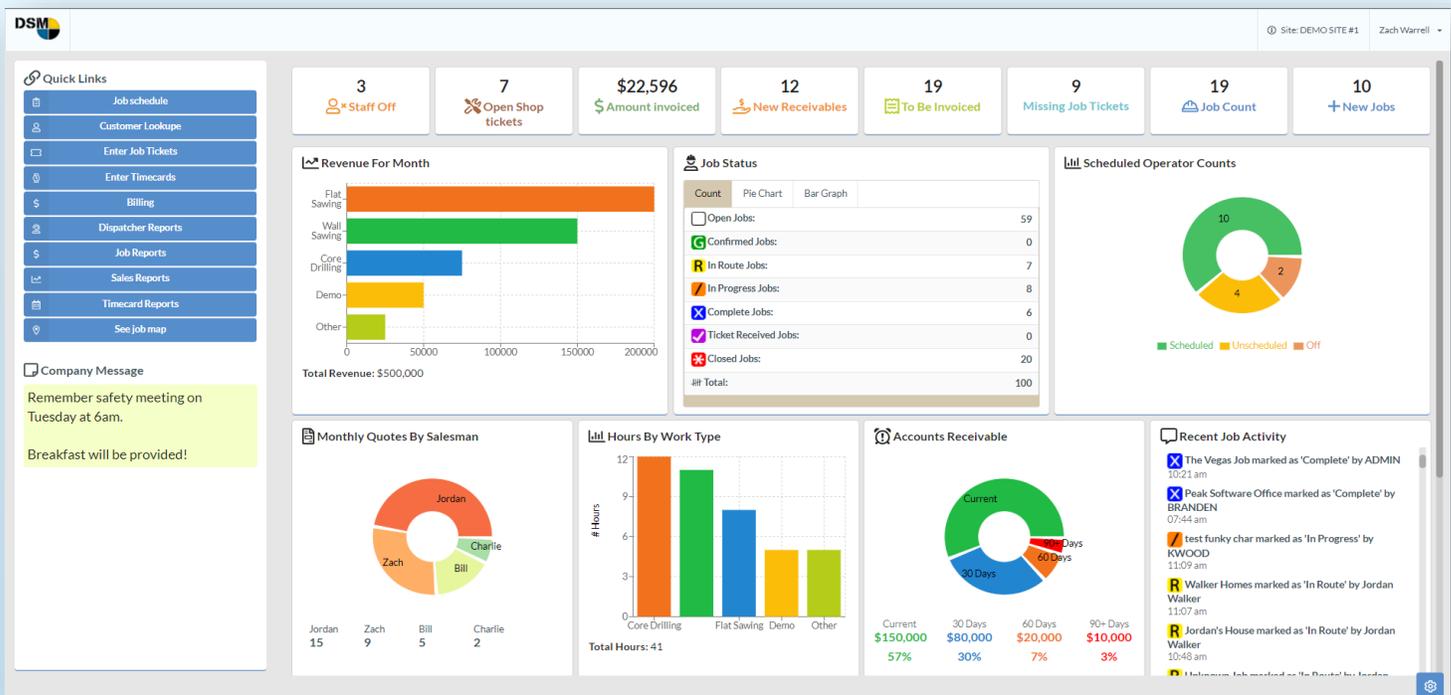
2021 has been busy for the DSM Software team as well, and in this newsletter we'll highlight some cool new functionality in both DSM and DSM Mobile. We'll also share some exciting news about what we have planned for the future of DSM. With additional staff in our development group, it's fair to say we're more than doubling down on DSM.

I want to thank everyone for giving us the opportunity to continue to serve them. We're headed to World of Concrete in Las Vegas in January, and we'd love to hear from you. **If you'll be attending the WOC show this year, please visit us in the Technology for Construction section, in booth N1666.**

- Charlie Warrell, President and CEO

DSM Web is coming and it's closer than you think. The first phase of DSM Web is expected to be available in January 2022 to existing Cloud customers. The product will be released in steps with the initial release providing a customizable executive dashboard with real time data on important statistics. Because these stats vary in importance from company to company, the various widgets are selectable and customizable. In addition, user's security is enforced so users with limited rights will be restricted in what appears on their dashboard. And, because DSM Web utilizes the latest web technology, it'll look great whether you're accessing it from your laptop, tablet or even from your phone.

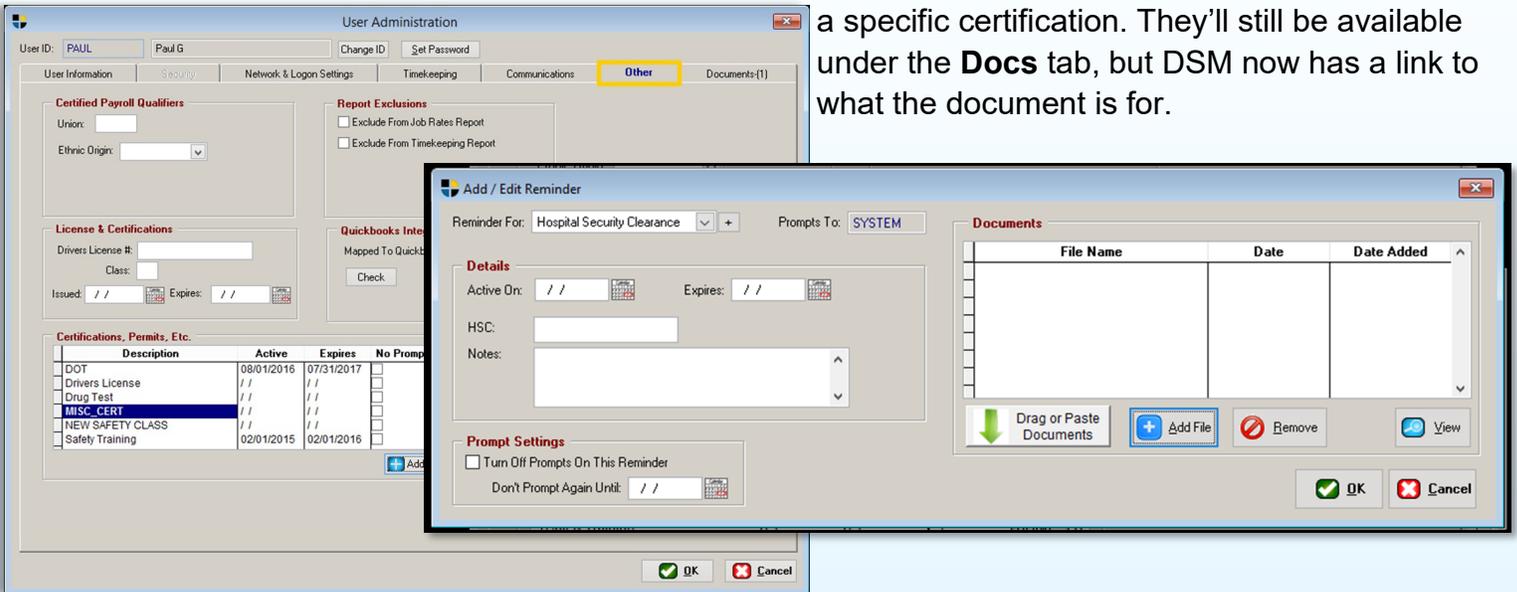
We hope you're as excited about DSM Web as we are. For more details, please see pages four and five for answers to some frequently asked questions about DSM Web.



Employee Certifications and Jobsite Restrictions

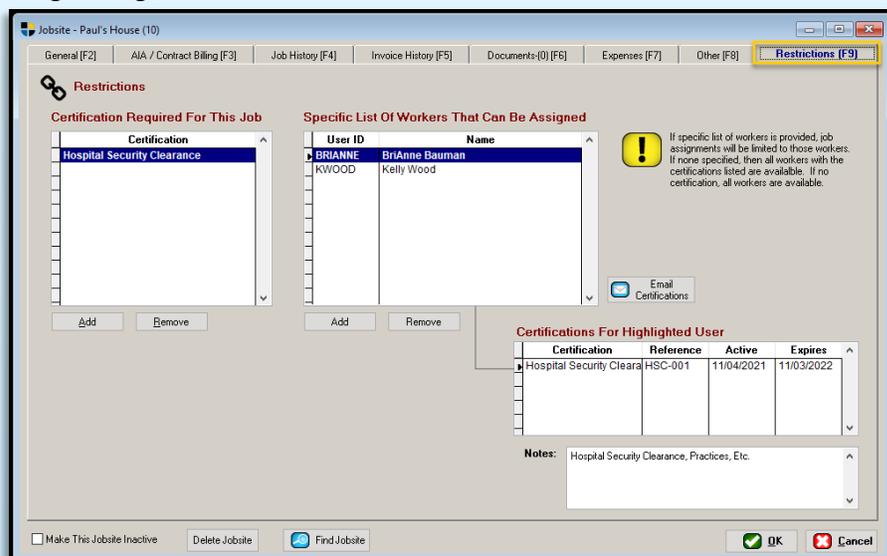
With increased requirements and restrictions placed on your workers, jobs are becoming more and more complex, and a customer approached us looking for a solution to help manage those restrictions and requirements more easily.

DSM already had definable certifications on a worker's user profile, but we've taken employee certifications to the next level. In many cases, you need documental proof of compliance with a requirement such as drivers license or completion of a safety training. In the past, you could drop those documents in a tab attached to the user. Now, you can better track those documents by attaching them to a specific certification. They'll still be available under the **Docs** tab, but DSM now has a link to what the document is for.



The screenshot shows the 'User Administration' interface for user 'PAUL'. The 'Other' tab is selected, showing sections for 'Certified Payroll Qualifiers', 'Report Exclusions', 'License & Certifications', and 'Certifications, Permits, Etc.'. An 'Add / Edit Reminder' dialog box is open, showing details for a 'Hospital Security Clearance' reminder. The dialog includes fields for 'Active On', 'Expires', 'HSC', and 'Notes'. A 'Documents' table is also visible, with columns for 'File Name', 'Date', and 'Date Added'. The dialog has 'OK' and 'Cancel' buttons.

Since some jobs require specific certifications for operators who are on site, a Restrictions tab has been added to the Jobsite. This allows you to specify what certifications are necessary and/or who is authorized to be assigned to this job. Using the document/certification links, DSM can build an email that collects all the necessary documents as attachments in the case they need to be submitted to the customer prior to beginning the work.



The screenshot shows the 'Jobsite - Paul's House (10)' interface. The 'Restrictions' tab is selected, showing a 'Certification Required For This Job' list with 'Hospital Security Clearance' selected. A 'Specific List Of Workers That Can Be Assigned' table lists 'BRIANNE BriAnne Bauman' and 'KWOOD Kelly Wood'. A 'Certifications For Highlighted User' table shows 'Hospital Security Cleara' with reference 'HSC-001', active date '11/04/2021', and expires date '11/03/2022'. The interface includes 'Add' and 'Remove' buttons for both certification and worker lists, and an 'Email Certifications' button. A warning icon and text are present: 'If specific list of workers is provided, job assignments will be limited to those workers. If none specified, then all workers with the certifications listed are available. If no certification, all workers are available.' The interface also has 'OK' and 'Cancel' buttons.

Once restrictions are assigned, the job assignment screen limits the pool of assignable workers to only those who meet the certification requirements. In the spirit of DSM, and in deference to your skilled dispatch team, you can choose to override restrictions if necessary. For example, if you need to assign a runner to drop off a piece of equipment, DSM has an easy way to do this, but it's going to let you know you broke the rules.

DSM Mobile - Spanish Translation

Estado del trabajo

- R** En ruta o en camino
- Z** En curso
- X** Completo
- Reiniciar

Detalles del trabajo

Tipo de empleo	Corte de bordillos
Cliente	Servicios de construcción Walker
locación de trabajo	Prueba IDS 1231 Clairmont Road Decatur, GA
Información del trabajo	N.º de trabajo del cliente : PO: 5646DS N.º de trabajo del cliente: 5416358
Capataz	Jordan Walker

Many of our customers want to take advantage of DSM Mobile, but have hesitated due to a language barrier. With DSM Mobile, you don't have to let a language barrier hold you back. By adjusting browser language settings, a web browser such as Google Chrome will automatically translate the DSM site and job details to whatever language you choose.

Lista de trabajo

Trabajos de hoy 06/12/2021 - lun

Trabajo 1: Servicios de construcción Walker / Prueba IDS

Día Al día

In addition to using your browser's translation settings, we have now added a translation ability in DSM mobile which enables your operator to type their job details in Spanish and DSM will translate that to English automatically when populating the DSM line item.

To enable this, the feature simply needs to be turned on. DSM Mobile will then automatically detect the Spanish language input and translate it. On the Job Ticket screen in DSM, you'll see a "Translated" indicator to alert billing that text was translated. If you want to see the raw Spanish, simply view the "Raw Field Entry" data.

Enter / Edit Invoice Line Item

Type: Service: COREDRILL Part #: [Select]

Quantity: 1.00 Unit: FEET Charge Tax On This Item

Description: Drilled 5 6 "holes in 4" slab with rebar

Item Was Translated From DSM Mobile

Price Each: 0.0000 Extended: 0.00

Standard Pricing Calculator

Diameter: 4.000 Depth: 4 Price: 16.000

Ingrese el trabajo realizado

Cant 1 Taladrar el núcleo

Taladró 5 agujeros de 6 "en losa de 4" con barra de refuerzo

So type it in English, "no problem", type it in Spanish, "no hay problema!"

DSM Web FAQ

Is the Web going to cost me more?

That's a big fat NO, so long as you're a Cloud customer, which most of our customers already are. Across the board, price increases are possible as inflationary increases are present for us just the same as they are for you. But rest assured, Web is not a premium add-on, rather it is your new interface and there is no upgrade cost to use it!

Do I have to be a Cloud Customer?

Yes. It is not possible for us to render your DSM web access unless the data is hosted within our cloud infrastructure. For older customers hosting their own data, there is an additional cost for cloud hosting in-line with the added responsibility of storing your data, securing it, managing archives and providing you access to it from anywhere in the world. DSM Web is now an additional benefit. Contact Peak Software Sales (801) 572-3570 for more details.

Can I use both DSM Web and Desktop?

Yes, both systems write identically to the same database so if you put a job in one interface, you will immediately see it in the other.

Will the Desktop Application still be available?

The long-term plan is to make the desktop obsolete, however, you will still have access to the desktop for the foreseeable future. The majority of everyday DSM functionality will come quickly in DSM Web but it will take quite some time to incorporate all of the lesser used desktop functionality.

Why has Peak Software chosen to move DSM to a web platform?

We are committed to utilizing the newest technology to create tools that will help you move your business forward and we firmly believe that by utilizing DSM Web to stay organized and informed, you will gain a competitive edge.

In our commitment to the web platform, we have doubled our developer staff and that new staff has really come up to speed in the technologies we deploy. In addition to an immense amount of new development, we have also been committed to supporting the desktop product and our customers' success as our first priority. Lastly, our customer base is generally very happy with our current application with the number one comment being, "We love DSM, we know it and it just plain works day in and day out." To those customers, "Thank you, and hang on because we're moving you forward, but gently!"

DSM Web FAQ Continued...

How can I trust that my data is secure?

DSM Web utilizes a dual factor authentication for its first use on a device. After that, you won't be burdened with that extra step. This prevents a simple leaked password from granting access to your system. In addition, when you turn on DSM Web, strong passwords must be enabled for everyone that has web access. You can also view a list of logged-in users at any time.

Do I have to learn a whole new system?

The methodology of DSM is proven and works incredibly well. Based on our experience, we don't expect the transition to be very difficult. Some interfaces will change using some of the most modern presentations available, but we will make sure no one gets lost in the process and some of the tried-and-true interfaces are preserved.

Does this change DSM Mobile?

No. DSM Mobile is a field tool designed for operators in the field to see their jobs, comply with safety forms and enter their field data into DSM. Operators would not typically have access to DSM Web, however, your Salesmen and Foremen may need access just as they might to the desktop.

When can I use it?

The roadmap is discussed in a separate document. However, we will be starting with a login to an executive dashboard and then building functionality from there. This is expected to be available in January 2022 for all our customers.

Why use Web now instead of waiting until it's fully developed?

We encourage our clients to share in the development experience. The dashboard will be useful right out of the gate and provide some consolidated information not found in one place on the desktop. By utilizing Web while we continue to develop, you will have influence on the development process and the end result. We're building DSM for you, and it will ultimately be shaped by you, our customers.

Don't miss out on the latest DSM enhancements and updates.

Navigate to File > Administration > Application Updates > Check for Updates

Salesman Default On Order: If a salesman assigned to a customer has been made inactive, they would formerly have still be assigned to new orders. This has been changed, and either the logged in user will be assigned or a salesman will need to be manually assigned.

Lead Tracking: The lead type (source) is now stored in the customer record on the other tab. This makes it easy to look up a customer and see how they found you. The Lead Tracking report can be used to show you that information over a specific time frame.

Off Work Report: The printed report includes a "Days" column which counts the days off. By design, it does not include weekends. The events show up, but the count of days is not incremented. An option has been added to allow you include the weekends in the count.

Service Records: DSM now automatically sends a text message to the operator (if assigned) notifying them that the truck or equipment service is complete. The operator must have texting setup on their user profile.

Job Scheduling Screen: Custom column options have been added for Job Phone Main and Job Phone Cell.

Email Screen: The from email field has been expanded to 50 characters. However, if you are typing this in each time, we suggest that you configure the email field in your user profile. Once this configuration is done, the from will be filled in automatically.

Document Forms: An option has been added to not require a document to be completed if attached to an order.

Converting Quotes To Orders: When converting a quote to an order, DSM now copies the documents associated with the Quote.

Job Ticket Entry Screen: The screen is now resizable. When resized and viewing a PDF document, you can see an email button which will allow you to email the highlighted document.

QuickBooks Integration Updates:

- AR Sync has been enhanced to accept ACH and EFT as payments. In prior versions they were named differently. DSM now maps those payment types to Electronic Fund Transfer.
- An option has been added to send the work date over as the QB line-item service date. To enable this option, go to File / Administration / Customer Configuration and select the Financial tab. Check the box "Send Line-Item Date Of Work To QB". This feature is only available for QuickBooks Online.
- The email address of the AP contact is now added to the QB invoice when transferred. If there is no AP contact in DSM, then the Main contact is used.
- In some version of QB Online, the invoice transfer does not add the Customer Name to the invoice. An option has been added to do this under File/Administration/Company Configuration, the Financial Tab, "Add Customer Name To QB Invoice Billing Address"

Purchase Orders Updates:

- PO List: A checkbox has been added under the total column which allows you to show only the amounts of the PO that have not been received. When checked, this shows only the sum of the unreceived line items and does not take into account any tax, shipping or discounts.
- PO List: A checkbox has been added to allow you to filter by receipts where the new invoice received date has been filled in and the invoice paid date is blank. This filter is useful for larger organizations where entry of the invoice is performed by the person receiving the PO and Accounts Payable wants a list of what to pay.
- PO List: A checkbox has been added to filter a PO by the Invoice Received status.
- A new tab has been added to the purchase order screen which shows the inventory receipts for that PO. The purpose of this screen is to allow you to quickly match up partial invoices when a PO is fulfilled in multiple shipments.
- PO Summary Report: An option has been added to group by GL account.
- Deleting A PO: A new security option has been added to allow you to control who can delete a PO. Prior to this, the delete right was granted along with the Add / Edit PO rights.
- PO's: An option has been added to turn off the default feature of automatically marking a PO closed when all the items have been received. You would want to do this if you decided to use DSM to track the invoice receipt for the POs. In this case, when all the invoices are marked as paid, DSM prompts you to close the PO.
- Receipt Of Inventory From PO's: When entering a receipt for a PO, four new optional fields have been added. Those fields are: Invoice Received, Invoice Number, Invoice Amount, and Invoice Paid.