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DEALER CHOICE SYSTEMS
Business software for the contract furniture dealer

August 2021 Software Update

Your site has been updated to software version 3.2.3 with various bug fixes and improvements, some of which are listed below.

Reload your browser cache by logging into Dealer Choice and then
- Press and hold the CTRL + Shift + R keys.
- Mac users, press and hold the Command + R keys.

Please reference the Dealer Choice User Manual (under the Help & Communications menu) for details on new features and enhancements.

Features and Enhancements in this release:

(1609) – Quote document

A quote document can now be created in Dealer Choice. A quote functions exactly the same as a proposal except no tabs past the Item Details tab are available on a quote. Quotes can only be used for pricing. Once you need to order product that was presented on a quote, you convert your quote to a proposal and on the proposal, you'll see all the tabs you have access to via your permission settings. After being converted to a proposal, your quote remains intact. A quote can only be converted to a proposal once. Please see the Online User manual for more details.

(1743) – Proposal Clone feature can now restore deleted proposals

The Proposal Clone feature will not display proposals that had been deleted in the "Proposal Number to Clone into new proposal:" selection box. Any proposal number displayed here that had been deleted will include the text "[DELETED]" to the right of the proposal number. Deleted proposal number can be selected and then cloned in to a new proposal for recovery.

(1740) – Display warning when entering payable on direct bill proposal

When entering vendor payables for a purchase order that exists on a direct bill proposal, a warning message will be displayed alerting the user that the payable is associated with a direct bill proposal.

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(1739) – Memo Cost error message correction

Prior to this correction, when entering a non-posting memo cost and if the Memo field was left empty, the “Debit Account”, “Credit Account” and “Memo” fields were highlighted as missing. Only the “Memo” is required and now only the “Memo” will be highlighted if left blank.

(1706) – Customer Deposit Refund icon

We had added new functionality to the View & Edit Customer Deposit window to allow for the remaining amount of a customer deposit to be refunding with a single key click. The “Refund Remaining Deposit” button will appear on the Customer Deposit View & Edit window if a partial amount of the deposit is applied. Clicking this button will create the customer refund payable in your Vendors – Receive & Pay Bills list.

(1704) – Item Details tab display of counts and sort options

We’ve added three counters and 17 filter/sort options to the Proposal Item Details tab. The counters are displayed at all times and they show the count of Inactive Items, the count of Ordered Lines and the count of Invoiced lines. There are 17 filter options which allow you to filter your line items by the selected filter. To see the full list of Item Details filter options, please review the online User Manual.

(1703) – Proposal Edit and Analysis report

A new report called Proposal Edit & Analysis, has been added to the Proposal & Sales reporting sub menu. A new permission in the Reports permission section controls whether or not users and/or groups of users will see the Proposal Edit & Analysis report option. Users with the Proposal Edit & Analysis permission will also see a new icon about the Proposals – Project Info tab, when a proposal is opened. This icon was added as a shortcut to access the report.