

April 2022 Software Update

Your site has been updated to software version 3.2.6 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:

(1862) – Project Status report – ‘Proposed, but not fully booked’ filter not working

The “Proposed, but not fully booked” filter on the Project Status report was allowing archived and complete proposals to appear. We also found that deleted proposals were allowed as well. The filter has been corrected.

(1860) – Customer Required Deposit Percentage override on Proposal print

A new proposal/quote print option has been added called “Required Deposit Percentage” to the Proposal and Quote Print Options window. The prompt will be visible to everyone and it will display the customer’s required deposit percentage amount that is stored in the customer’s table. Only users with the new permission called “Deposit Percentage Override” (Proposals permissions section) will be able to enter a percentage to override the default. For users with permission, they can change the required deposit amount per proposal.

(1858) – Proposal PDF download, new default filename

When downloading a proposal PDF, the default file name was ‘file.pdf’. We have changed the default to the text “Proposal_” followed by the proposal number then the .PDF extension.

(1857) – Nemschoff electronic purchase order template is now available

We have created an electronic purchase order option for Nemschoff product. Please contact support to have your site updated to use this new feature.

(1852) – Vendor remittance address field validation

Previously, there was no validation on the vendor remittance address fields so the user was not alerted to missing fields, if applicable. This has been corrected. If any vendor remittance data is entered, then all remittance address fields must be entered.

(1845) – Open Proposal report – add Proposal Description

The proposal description text has been added to the Open Proposal report to help with project identification.

(1842) – Partial line invoicing

This release includes our first phase of features related to partial line invoicing. We have attached the Partial Invoicing user guide to this message which notes the details on this feature. Lines can now be invoiced by partial quantity or by a percentage of the quantity.

(1835) – Receive Vendor Credits Dialog not functioning correctly

Via the Vendors – Receive & Pay Bills – Receive Vendor Credits menu option, the input window allowed for the type to be changed from Credit. Now, only a type of Credit is available for this input method.

(1831) – Acknowledgement data input window updates

The Acknowledgement data input window has been expanded to allow for more item detail to be displayed and to allow for a Deliver Date to be entered for line items. The Purchase Orders tab and the Project Status report Ack Input option are now identical.

(1828) – Multi-selection User Interface enhancement

The multi-select functionality has been modified so you can now toggle a selected element with a single click. Examples of multi-select fields are “General

Print Fields and Line Item Print fields (proposal, quotes, invoices, etc.) You can simply click on a print option to select or deselect it without using the Ctrl key.

The following key sequences still work but are no longer required: CTRL + click, or SHFT + click.

The CTRL + SHFT + click key sequence will toggle all select/deselect items.

(1826) – Print option changes (Zero Sell Items and Negative Sell Items) for proposals, quotes, pro forma documents and invoices

The Line Item Print Fields option called Zero Sell Items has been modified so it only displays lines that have a \$0.00 sell price. Previously, the Zero Sell Items option also included negative sell amounts.

A new Line Item Print Field option called Negative Sell Items has been added, to allow for the display of lines that have a negative sell (less than \$0.00) price.

Both of these options are available for proposals, quotes, pro forma documents and customer invoices.

(1785) – Proposal Trailer Pages feature added to the proposal print

The proposal trailer pages feature, released in the Nov. 2020 version 3.2.0 update, added the functionality to select PDF documents to be embedded in the proposal PDF, instead of separate attachment files, when being emailed.

This enhancement adds the proposal trailer pages feature to the proposal print function. PDF documents that had been uploaded to the proposal file vault as 'Proposal Trailer Documents' or via the System Configuration – "Your Company Proposal Trailer Docs" section, can now be selected to be included as trailer pages (embedded) to your proposal PDF when printing a proposal.