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DEALER CHOICE SYSTEMS
Business software for the contract furniture dealer

June 2024 Software Update Release Notes
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Your site has been updated to software version 3.3.5 with various bug fixes and improvements, which are listed below.
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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:

(2099) – Commission report – New filter "Exclude Customer Credits from commissions".

> A new filter called ""Exclude Customer Credits from commissions" has been added to the Commission report filter options. When selected, Customer Credits will not be displayed or deducted from proposal sell totals.

(2098) – Import Items into Proposal – From Another Proposal function enhancement.

> The Import Items into Proposal function has been updated to allow for line items to be copied from Quotes. Previously, you could only copy lines from another proposal. The prompt now appears as "Another Proposal/Quote".

(2095) – Pro forma General Print Fields new print option "No Proposal Comments".

> A new General Print Fields print option called "No Proposal Comments" has been added to the pro forma document. Previously, Proposal Only comments appeared on the pro forma document by default. This new print option allows users to prevent Proposal Only comments from being displayed.

(2094) – Proposal General Print Fields new option "No Accepted By line".

> The text "Accepted by:" is printed on all proposals by default. A new Proposals General Print Fields print option called "No Accepted By line" has been added to allow users to prevent the "Accepted By" line from being displayed.

(2091) – Job Costing report updates.

In a previous release, the Job Costing report was changed to show invoice credits that have been applied to invoices. The Received field amounts were lowered by the credits (credits were being deducted). That has been changed, credits are no longer deducted from the Received amount fields.

(2089) – The Help & Communications – 'Newsletter' menu option has been changed to 'Release Notes' to be more consistent with its purpose.

(2088) – Three new input fields added to Purchase Order Summary window.

Shipping Contact, Shipping Phone, and Shipping Fax

When you open an existing purchase order, the Purchase Order Summary window will now allow for editing the 'Shipping Contact', the 'Shipping Phone' and 'Shipping Fax' fields for the purchase order being viewed.

These input fields only update the purchase order being viewed. Editing these fields does NOT update or change the same fields on the Proposal – Install tab.

(2087) – Proposal 'Copy as a new line' function has been updated.

The 'Copy as a new line' function on the Item Details tab has been updated to include Teknion CR numbers, if applicable. Previously, this field was not copied.

(2086) – Proposals – Install tab, new input field 'Installer Count'.

We've added a new field on the Proposal – Install tab. This field is for the number of installers that have been assigned to the project. This field will also be displayed on the Install & Delivery Schedule, if added to the Proposal – Install tab.

(2083) – Project Management – Install & Delivery Schedule enhancements.

The Install & Delivery Schedule has been updated to include proposals that have a Target Install/Delivery Date (on the Proposal – Install tab). Proposals that have a Target Install/Delivery only will now be displayed on the Schedule shaded in red. Proposals with a Scheduled Install/Delivery date are shaded green. If both dates exist, the Scheduled Install/Delivery date takes precedence, and the proposal will appear shaded in green.

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(2082) – Multiple system enhancements as noted below.

System Configuration – Products tab, the prompt fields "Sub Total Title" and "Sub Total?" prompts have been changed to "Subtotal Title" and "Subtotal?".

Proposal – Print Options – General Print Fields option name change.

The "Display Sub Totals" option has been changed to "Display Subtotals".

Chart of accounts search function.

The option to search by 'Cost of Goods Sold' type accounts has been added.

Pro forma document enhancements:

A new check box filter called "Exclude Sales Tax" has been added to the pro forma document print options window. This new option appears below the "Include Deposits?" print option. When "Exclude Sales Tax" option is selected, any sales tax applied will not be displayed or included in the "Total Due" amount.

A new General Print Fields option called 'All proposal lines are not included' has been added to the pro forma document print options window. When selected, this option will display the text 'All proposal lines are not included' at the top of the document if all lines are not selected. If this print option is selected and all lines are selected, the text will not be displayed.

The Line Items selection section has been enhanced to include the line number, the quantity, and the full product description to help make line-item identification easier.

Customer Invoice - Review Your Invoice window when no sales tax has been applied.

In the Review Your Invoice window, after selecting lines to be invoiced, if sales tax has not been applied to the proposal, the message 'No sales tax applied' will appear, warning the user that sales tax has not yet been applied, if applicable.

The text 'No sales tax applied' will appear in the sales tax area on the Invoice preview to alert users that no sales tax has been applied to the invoice.

Acknowledgement data entered will now be displayed:

In the 'Create a New Customer Invoice' window, where lines are selected to be invoiced, we now display acknowledgement data that has been entered. If no acknowledgement data exists, we still display the warning icon ⚠ with the tool tip 'Acknowledgement data is missing!'.

If the Acknowledgement number, Ship Date and/or Received Date have been entered, those fields will be displayed per line.

(2068) – New Home Page frame - Recent Auto Alert History.

A new Home page frame called Recent Auto Alert History has been added. The Auto Alert function must be configured in your System Configuration before any data will be displayed here. This frame will display the most recent 50 auto alerts within the last 30 days. There is no Clear List function as the list is populated from the system Auto Alert feature. If your permissions allow, you can access proposals listed here by clicking on the proposal link in this frame

(2068) – History tab on Proposals view.

A new proposal tab called History has been added. This tab will display any Auto Alerts generated for this proposal. There are no permissions needed to see the History tab.