DEALER CHOICE SYSTEMS
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August 2017 Newsletter

Your site has been updated to version 3.0.5 with various bug fixes and improvements as well as the enhancements listed below.

Features and Enhancements in this release:

(165) Highlighting of punch purchase order and invoice numbers
Punch purchase order and punch invoice numbers will now appear highlighted in yellow on the Purchase Orders and Customer Invoices tabs for easy identification.

(899) In House purchase order flag and the Commission report
A new flag is being added to the purchase order create and edit that will allow a purchase order to be flagged as an "In house" purchase order. Any purchase order that will not generate a vendor invoice should be flagged as an in house purchase order. In house purchase orders with no associated payable will allow the proposal to appear on the commission report when the "Proposal payables must be received in full" filter is used on the commission report.

(914) Pro forma document print and number sign character
When a number sign character (#) was included in text fields on the pro forma document, some of the text that followed the characters did not print. This has been corrected, now a number sign (#) can be used in text fields for the pro forma document print. You cannot use a number sign character in the pro forma invoice number field.

(939) Accounts Receivable report
A new report filter called "Include Unapplied Credits" has been added. Unapplied customer credits will not be automatically displayed on the A/R report. This new filter must be checked to allow unapplied customer credits to be displayed now.

(972) Proposal Clone feature
A new feature is being added that will allow users to create a virtually identical copy of an existing proposal. The proposal clone feature will copy the Project Info, Design, Install and Item Details tab information

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into a new proposal. Data from other tabs will not be copied to the new proposal (purchase orders, invoices, etc).

(973) External purchase order notes

A new field has been added to the purchase order summary view that will allow text to be added to purchase orders and this text will be displayed on the purchase order.

(977) Added "Delivery Between" prompts on purchase order create view

In the Create Purchase Orders window, we have added a new prompt field called "Deliver Between". If dates are entered in the two input fields, they will appear on the purchase order comments frame as "Please deliver between" and the two dates will be displayed. You must enter both dates to use this feature.

(987) Proposal List Export option

A new feature called Proposal List Export has been added. This feature requires a new permission (under the Proposals section in Permissions) called "Proposal List Export" to be selected for Users or Groups before the option can be used. When the Proposal List is filtered by the Proposal Search option (to limit the number of proposals displayed), an export icon will appear allowing the user to download a spreadsheet containing the filtered proposal list data.

(1014) Modified "add more lines" function on vendor payables entry view

In the Payables entry window, the [add more lines] prompt has been changed to include an input box which allows values from 1 to 25 to be entered. When a number between 1 and 25 is entered and the [add more lines] button is clicked, that number of new lines will be added to the bottom of the display field. If no number is entered and the [add more lines] button is clicked a single new line will be added.

(1015) Customer List export filtered by Sales Rep

The customer list export has been corrected so it exports a single customer reference instead of a reference per proposal.

(1022) Proposal print page break whitespace

In some cases where very long item descriptions were used on proposal line items, the PDF display of the line item description would not start at the top of the appropriate page, resulting in significant

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white spaces. This has been corrected and line items with very long item descriptions will print in the appropriate location on the page.

(1026) Add control for sending Work Order internal messages

When the "Complete" check box is selected on a work order, a prompt called "Send Internal Message" will now appear. This allows the user to force a message (by checking the check box) to be sent to the sales rep on the proposal, notifying them that the work order has been set as Complete.

(1029) Backlog Report displays "Partially Acknowledged"

The Backlog report displayed "Partially Acknowledged" on proposals that were clearly fully acknowledged. This has been corrected.

(1030) Purchase Order Footer message

A new field has been added to system configuration called "Footer message to be printed on all Purchase Orders". This field acts exactly as the proposal and customer invoice footer message allowing you to define text that will be displayed on all purchase orders. Users cannot remove this text from purchase orders at will.

(1032) Changing Proposal Order Type after Invoicing

Previously, once customer invoices were created on a proposal, you could no longer change the proposal Order Type on the Project Info tab. This restriction has been removed and you can now change from Normal to Direct (or vise versa) at any time.

(1036) Proposal Status options delete

In System Configuration, you could not delete the very first entry of the Proposal Status Options. This has been corrected.

(1046) Check clearing error message

In some cases, after searching the check register and then trying to void a check, an error message was displayed saying the check was already voided. This was caused by not having a specific checking account selected. Now the check register search function requires that you select a checking account first to eliminate this error.

(1048) Spreadsheet export Security Warning

In some cases when a spreadsheet that was downloaded from Dealer Choice was opened locally, a Microsoft security warning was displayed. This can be caused by security setting on each users' computer but we also enhanced the spreadsheet export processor to include newer security features to help eliminate the occurrence of this Microsoft warning message.

(1052) Proposals "Flag as Complete" checked box

On the Project Info tab in the Order Type frame (lower right side), we have added a checked box called "Flag as complete". If this check box is checked, this proposal will no longer appear on the Project Status report by default. To see any proposal with the "Flag as complete" check box checked on the Project Status report, use the "Marked complete" filter.

What's Next?

The development team is always working on several projects that are in various stages of progress. The next release is expected to include the following, as well as several other features and enhancements:

Accounts Payable report enhancements

We've discovered cases where the AP report balance total would not match the Balance sheet AP account total. Several additional display fields are being added to the AP report to correct this issue.
