DEALER CHOICE SYSTEMS

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Build 3.0.9 Newsletter April 2018
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Your site has been updated to version 3.0.9 with various bug fixes and improvements as well as the enhancements listed below.

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Features and Enhancements in this release:

(1215) Project Status report - "Partially booked, with lines remaining to be booked" filter not working.

> The "Partially booked, with line items remaining to be booked" filter on the Project Status report has been corrected to show the proper result set of proposals. Previously, proposals with no purchase orders were also included in the result set.

(1213) Inactive tax rules display.

> In system configuration on the Tax Tables section of the Company Settings tab. When a tax rule has been set to inactive, we now display the tax rule as italicized and highlighted. We also added tooltip text so when the mouse pointer hovers over the italicized, highlighted tax rule, a message appears saying the rule is inactive. This feature is only in System Configuration, if a tax rule is inactive, then it will not be displayed at all in proposal finalization or in the customer database tabs.

(1201) Display sales tax on Item Details tab.

> Once sales tax has been added to a proposal, we now display the tax rules that were applied to each line item on the Item Details tab.

(1209) Add Customer PO number to Customer Statements.

> The customer PO number (Proposals - Project Info tab - Customer PO field) will now be displayed on the Customer Statements report for each proposal displayed.

(1208) Add Customer PO number to A/R Report.

The customer PO number (Proposals - Project Info tab - Customer PO field) will now be displayed on the A/R report for each proposal displayed.

(926) Herman Miller e-order failure for special characters in the Customer PO field.

In some cases, the text entered (special characters) in the Customer PO field in the Proposal Project info tab would cause processing problems for Herman Miller. These special characters ('~', '!','@', '#', '$', '%', '^', '&', '*') are all allowed now and will be handled properly in the Herman Miller XML order file.

(806) Direct Bill invoice edits not allowed.

Previously, direct bill invoiced line items could be edited to change the cost, which caused problems when trying to delete the invoice. Line items on a direct bill invoice can no longer be edited. The invoice must be deleted first, then any edits made and a new invoice created.

(623) New Journal Search option: Search By Dollar Amount.

A new journal search option has been added called "Dollar Amount". A dollar mount can be entered here. We do partial matches on this number, so, for example, if 15 was entered, we will return all journal entries that contain a debit or credit amount that starts with 15. This includes, 15, 15x, 15xx, etc.

(569) Vendor comment field size expansion.

The Vendors - Payments tab, "Comment To Appear On POs" input field has been expanded to 256 characters from 128 characters to allow for more text to be entered.

(553) Automatic email blind copy.

An email blind copy function has been added to System Configuration - Company & System Settings - System Settings called "Automatic

Email Blind Copy Address?". If a valid email address is entered in this field, then a copy of all emails sent from Dealer Choice will be copied to this address.

(552) Automatic email carbon copy.

An automatic email carbon copy function has been added to System Configuration - Company & System Settings - System Settings called "Automatic Email Carbon Copy?". If this is set to yes, then each user will automatically be carbon copied on any emails they send from Dealer Choice, eliminating the need to enter your own email address when sending email. When set to "Yes" in System Configuration, a message will be displayed in the Email & Fax terminal alerting users the at the Auto CC feature is on and that they don't have to copy themselves.

(475) Vendor Discount clone function.

A new button called "Clone Discount" has been added to the Discount Edit window. This feature allows for an existing vendor discount to be cloned as an exact copy. The new entry will have the original Discount Description followed by " -- Clone". You can then edit the cloned copy to make any necessary adjustments without modifying the original discount.

(280) Proposal groups sorting options.

We had added several new features to the Item Details "right mouse click" function for manipulating line items. The new features are for sorting proposal groups on the Item Details tab. When you right click on a grouped line item, you will now see the following new functions, allowing proposal groups to be sorted in ascending or descending order at the top or bottom of your proposal. The new function are:

Sort all groups at top ascending
Sort all groups at top descending
Sort all groups at bottom ascending
Sort all groups at bottom descending