

December 2022 Software Update

Your site has been updated to software version 3.2.9 with various bug fixes and improvements, some of which are listed below.

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:

(1946) – New field for selecting Building Management POC contacts

A new field has been added to the proposal Install tab called 'POC from existing contact'. This new selection field exists only when the Customer and/or the Propose To entries have contacts defined in their customer table. Contacts can be selected from the selection list or you can still enter data as free text.

(1937) – Proposal Search function – User Filter updates

This filter has the 'All Sales Reps' pre-selected as the default. When selecting additional options, this option remained selected. The User Filter option has been reverted to a multi-select option, meaning that a single key click will de-select any other selected options. This feature requires SHIFT + CLICK to select multiple options.

(1930) – Install Location added to the Design tab PDF

The Design tab PDF generation now includes the Install Location from the Install tab if the Install Location field is populated.

(1924) – Saved and Shared reports not being retained

The Save and Shared report feature was not retaining saved/shared reports in some cases. This has been corrected.

(1898) – Income Statement print groups

You can now define income statement print groups and assign income statement accounts to specific print groups. The accounts assigned to a print group will appear within the grouped section, consisting of a group name title and a group name subtotal.

Details on this new feature are included on the online user manual and we have a user guide document for this feature as well.

Updates added to version 3.2.8 after initial 3.2.8 release:

(1926) – Item Details – Function menu – Update lines to zero sell modification

The Function Menu option “Update lines to zero sell” previously did not allow for ordered lines to be changed. Now, the “Update lines to zero sell” will change sell pricing on lines that have been ordered. As was prior to this change, this function will not change sell pricing on invoiced lines.

(1923) – Proposal Punch proposal print option changes for Subtotals

An error was discovered with the Display Subtotals on the Punch proposal print function. In the case identified, the proposal items were filtered by the “Booked but not invoiced” print option and the results were not accurate. This has been corrected.

(1920) – Quotes in the Install tab causing text truncation

It was reported that when double quotes (“) were included in text in the Install tabs “Task Seating” and/or “Guest Seating” fields, the text after the quotes symbol was not displayed. This has been corrected.

(1919) – Quotes in in the Design tab causing text truncation

It was reported that when double quotes (“) were included in text in the “Product” fields on the Design tab, the text after the quotes symbol was not displayed. This has been corrected.