P.O. Box 21058
Catonsville, MD 21228
www.dc-sysllc.com
support@dc-sysllc.com

DEALER CHOICE SYSTEMS

Business software for the contract furniture dealer

May 2023 Software Update

Your site has been updated to software version 3.3.1 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:

(1973) – New proposal alert message when Proposal sales rep assignment does not match the Customer record sales rep assignment.

A new check has been added to proposals to identify when the Proposal assigned Sale Rep name does not match the Customers table assigned Sales Rep. If the Proposal assigned Sale Rep name DOES NOT match the Customers table assigned Sales Rep, the Sales Rep name in the Proposal list will be highlighted and a message will appear on the Project Info tab noting that the two sales rep names do not match. In cases where the two names DO NOT match, the Sales Rep name will be highlighted in the Proposals List view. This is only an alert feature. This does not prevent you from assigning any Sales Rep name you wish to a proposal. This message simply alerts you that there is a difference between the Proposal and Customer records.

(1971) – New permission required for “Clone Proposal” tab and right click menu.

A new permission called “Clone Proposals” has been added to the Proposals permissions section called “Clone Proposals”. If a user or user group does NOT have this permission checked, they will NOT see the “Clone Proposal” tab when creating proposals nor will they see the “Clone this proposal” right click context menu in the Proposals List view. This permission is NOT selected by default.

(1970) – New permission required to see “Post Commissions” button.

A new permission called “Post Commissions” has been added to the Reports – Proposals & Sales Reports permissions section called “Post Commissions”. If a user and or group does NOT have this permission checked, they will NOT see the “Post Commissions” button on the Commission report.

Copyright by Dealer Choice Systems. This document is proprietary and confidential. No part of this document may be disclosed in any manner to a third party without the prior written consent of Dealer Choice Systems

P.O. Box 21058
Catonsville, MD 21228
www.dc-sysllc.com
support@dc-sysllc.com
DEALER CHOICE SYSTEMS
Business software for the contract furniture dealer

(1969) – Check Run report not displaying all payment amounts.

In cases where multiple vendor payables were entered with the exact same invoice number for different purchase order numbers and paid on the same payment (check), the invoice number appeared twice, but only a single payment amount appeared. This has been corrected.

(1968) – Project Status report, filter not working correctly.

The “Booked, fully acknowledged, not yet invoiced” filter on the Project Status report was not producing accurate results. This has been corrected.

(1965) – Saving selected proposal trailer file selection.

The ability to save the last used proposal trailer document settings which can be applied "Saved templates" and "Select my print options" has been added.

There is a new System Configuration – System Settings tab setting, titled "Save Proposal Trailer Document Selections" that must be selected for this feature to be activated. It is OFF by default. This will keep the original functionality the same. Any site that would like to activate it will be able to do so via this setting.

Once this option is set to Yes and then the ‘Append Proposal Trailer Documents to Proposal’ option is selected in the Proposal Print Preferences window is selected, the ‘Append Proposal Trailer Documents to Proposal’ checkbox will be checked when printing subsequent proposals.

(1963) – One click customer deposit refund enhancement.

The Refund Remaining Deposit function has been updated to allow for any portion of a customer deposit to be refunded with one key click. Prior to this update, a portion of the deposit had to be applied before the remainder could be refunded.

(1957) – Sell price changing when cost price is edited.

It was reported that the sell price was changing when the cost was edited on lines where the sell was calculated as a percentage off list price. This has been corrected.

Copyright by Dealer Choice Systems. This document is proprietary and confidential. No part of this document may be disclosed in any manner to a third party without the prior written consent of Dealer Choice Systems

P.O. Box 21058
Catonsville, MD 21228
www.dc-sysllc.com
support@dc-sysllc.com
DEALER CHOICE SYSTEMS
Business software for the contract furniture dealer

(1951) – Install and Shipping Location names containing apostrophes.

On the Proposal – Install tab, install and shipping location names that contained apostrophes were not displaying correctly in the drop-down selection option. This has been corrected. This applies to Customer and Vendor locations.

(1947) – Proposals – Propose To field, added Propose To Contacts selection.

On the Project Info tab in the Propose To field, the Contacts selection option has been updated so it now will include any contacts defined for the Propose To on the proposal. You must save the proposal first then if contacts exist for the Customer and for the Proposal to, then both sets will be displayed for selection. The Customer contacts will be displayed first, then any Propose To contacts will be listed. You will have the option to add contacts to either if you have the Customers – Contact Info – Create Contacts permission.

(1942) – Proposal auto-save not firing when clearing dates.

It was reported that changes to the Install/Delivery Date fields on the Proposal – Install tab, the auto-save feature was not firing to save those changes. This has been corrected.

Copyright by Dealer Choice Systems. This document is proprietary and confidential. No part of this document may be disclosed in any manner to a third party without the prior written consent of Dealer Choice Systems