

November 2024 Software Update Release Notes

Your site has been updated to software version 3.3.7 with various bug fixes and improvements, 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:

(2139) – The “Submit Via” prompt missing for Direct Bill invoices in Invoice Preview.

In cases of zero sell direct bill invoices, the “Submit Via” prompt was not being displayed. This forced a default submit option of “email” in error. Now, the “Submit Via” option is displayed.

(2134) – Cash Requirements report describes credit card bills as customer refunds.

The Cash Requirements report has been updated to correctly describe credit card bills as Invoices instead of Customer Refunds.

(2133) – Vendors – Tiered Freight Fee functionality added.

On the Vendors – Payment tab Freight Fee function has been modified to function exactly like the tiered Small Order Fee function. The Freight fee can now be entered by tiers, per List or Net pricing.

(2132) – Proposal Summary - Option added to include punch lines

The Proposal Summary (scales icon) on the Item Details tab has been updated to allow for any punch lines on the Service & Punch tab to be included in the total calculations.

In the Item Details tab – Proposal Summary view, the link “Recalculate with punch items” will now appear above the proposal total amounts. Clicking this link will include any punch lines in the total calculations. When activated, the link text

will change to “Recalculate without punch items” and the Proposal Summary icon list will be disabled.

The icon list is disabled so changes will not be inadvertently made to any included punch lines. Once the link is clicked again, so punch is no longer included, the icons will appear again.


(2131) – Locked tax rules doesn’t allow [update tax] option during invoice creation.

When a proposal had been finalized for a customer or install location that had no tax rules defined or selected, the [update tax] link was not displayed in the Invoice create window. Now, if tax rules are updated/assigned to a customer and/or location (and if they are locked) after the proposal has been finalized, the [update tax] link will appear, and the selected tax rules can be applied before the invoice is created.

(2130) – Proposal Print options updates.

The proposal “Line Item Print Fields - Print lines that are:” functions have been modified to work together instead of exclusively. Previously, if more than one of these options was selected, only one of the options was used to display lines. Now, each selected condition is included so any of the selected options will be used to modify the output.

(2114) – Item Details – Item Detail View option added.

A new icon has been added to the Item Details tab. This new icon () is the Show all item details icon. When clicked, the Item Details view will expand to show line details that aren’t already displayed in the normal view. We’ve included a timer icon for larger proposals. The circle icon will be displayed on lines where the detailed data is being collected and prepared for display. Since each line’s detail is displayed, this can take several seconds to complete.

(2109) – Commission report proposal number added to PDF released in 336.

When the print option was added to the commission report, the proposal number was not displayed in the PDF. This has been corrected and was released in all sites before this update (released in version 3.3.6).