P.O. Box 21058
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DEALER CHOICE SYSTEMS
Business software for the contract furniture dealer

October 2020 Newsletter

Your site has been updated to version 3.2.0 with various bug fixes and improvements, several of which are listed below. Version 3.1.9 updates have been included in this release.

Reload your browser cache after logging into Dealer Choice:

- Windows users, press and hold the CTRL + SHIFT + R keys.
- Mac users, press and hold the Command + R keys.

Included in this release:

(1610) **New Feature**: Print Options access for Proposals in Email/Fax Terminal

You now have access to Proposal Print Options from the Email and Fax terminal when sending documents from Dealer Choice. You can now verify and/or adjust proposal print setting before the document is sent. We've added the Print Options icon to the right of the Proposal number which allows for the print settings to be adjusted if necessary.

(1603) **New Feature**: Item Library Enhancements and new System Configuration switch

The Item Library can now include saving a Sell price when a manual entry line items is saved. We've included a new control in the System Configuration – Company & System Settings – System Settings tab called "Item Library: Save Sell Price?". If this is set to Yes, then the sell price entered for a line item will also be saved, when the Item Library is active.

(1597) **New Feature**: Customer PO number search filter added to Project Status report

We've added a new filter to the Project Status report to include additional search filter functionality by Customer PO number. The Customer PO number is stored on the Proposal – Project Info tab.

(1596) **New Feature**: Punch invoice numbers are highlighted on the A/R aging report

The A/R aging report will now display any punch invoice numbers highlighted in yellow to identify them as punch.

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(1595) **New Feature**: Punch purchase orders are highlighted on the A/P aging report

The A/P aging report will now display any punch purchase order numbers highlighted in yellow to identify them as punch.

(1594) **New Feature**: Customer File Vault and permissions have been added

We've added a Customer File Vault to the Customers table. The Customer File Vault functions exactly like the Proposal File Vault. The Customer File Vault files are available in the Send Email/Fax window so these files can also be included as attachments. We've also included new permissions for accessing the Customer File Vault in the Customers permissions settings.

(1591) **New Feature**: Purchase Order report displays fully acknowledged PO's

The Purchase Order report will now display a check mark symbol in the "Fully ACKD" column if every line item on the purchase order contains Ack. information.

(1589) **New Feature**: Append text to Proposal Number and permissions

We've added a new feature that allows you to append text (letters and/or numbers) to an existing proposal number. Once a proposal has been saved, the "Append to Proposal No" prompt will display to the right of the Proposal No: field. You can enter any text you wish to be appended to the proposal number. The total size of the proposal number, plus any appended text cannot be more than 14 characters. The available input character spaces for appended text will be displayed as "X"'s so you know how many free spaces remain. To be able to append text to proposal numbers, you must have the new Proposal permission called "Allow Append Proposal Number" selected.

(1559) **Enhancement:** Haworth electronic order entry updates

We have updated our Haworth e-order processor to the include the latest updates as mandated by Haworth.

(1553) **New Feature**: Vendor Net Terms print option on Purchase Orders

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We've added a new print option on the Purchase Order print setting window called "Include Vendor Net Terms". If this checkbox is selected and if the vendor has payment terms defined in the vendors table, the terms will be included on the Purchase Order header (upper right side under the PO number).

(1543) **Bug Fix:** Proposal can be saved with no customer name.

The proposal field validation was not completing before the save process ran, allowing in rare cases, the proposal to be saved with no customer name. This has been corrected.

(1528) **New Feature**: Proposal Trailer Pages (merged to end of proposal PDF)

There are now multiple options for incorporating PDF files as appended pages to proposals, instead of using email attachments. The proposal trailer pages will be added to the proposal PDF document as the last page(s).

The first option for including proposal trailer pages is to upload them via System Configuration – Company & System Settings – System Settings – "Your Company Proposal Trailer Docs:" function.
Files uploaded here will be available to be included as the last page(s) of your proposals.

The second option is through each proposals File Vault. When uploading a file to the proposal File Vault, there is a new check box asking if this file is to be used as a Proposal Trailer Document. If the box is checked, then this file will be available to be appended to your proposal when you are emailing or faxing it.

For files to be eligible for proposal trailer pages, they must be uploaded as PDF files and the proposal document must be selected when email/faxing.

(1523) **New Feature:** "Sales Rep Assigned" field added to the Customers table

We've added a new field called "Sales Rep Assigned" to the Customer database, on the General Info tab. This field is linked to your site list of Users so sales reps can be assigned to specific customers. If you have added a custom field to your customers

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table for sales rep name, you can make this inactive as this feature is now a standard database field.