

November 2020 Newsletter Updated 12/04/2020

Your site has been updated to version 3.2.1 with various bug fixes and improvements, some of which are listed below.

Reload your browser cache by logging into Dealer Choice and then

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

Features added to 3.2.1 since it's November Release:

(1661) **New Feature:** Progress Billing functionality added to pro forma document

The pro forma document feature has been updated to include a "Progress Billing" option. When the "Progress Billing" check box is selected, the percentage amount requested will be calculated on the total product amount. In normal mode, the percentage amount requested is calculated after any received deposits have been deducted from the total product amount.

(1658) **New Feature:** Store previously used Purchase Order Pricing option selection

The purchase order print option "Choose Purchase Order Pricing" will remember the option last used after you print a purchase order.

(1657) **New Feature:** Added Proposal sort by Appended data

The Proposal List "Proposal" column title has been updated to include "- #". This column title symbol, when clicked, will sort the proposal list by any appended proposal data.

(1641) DC Messages inbox updates

The DC Messages has been updated to display messages assigned to the different folders (Inbox, Sent and Deleted) correctly.

(1637) **New Feature:** Nested Chart of Accounts display updates

The Chart of accounts list has been updated to properly display multi-level nested accounts.

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Features and Enhancements in the original 3.2.1 release:

(1636) Purchase Order Report identify In House PO's

The Purchase Order report has been updated to include a visual identifier on any purchase orders that have been flagged a "in house" orders. The letters "IH" will appear after the purchase order number. We've also added a filter called "Display In House PO's Only?" to the report settings options allowing only in house purchase orders to be displayed.

(1635) Proposal Search – Search by user enhancements

The Proposal Search – Sales Rep function has been replaced with the User Filter. Previously, this feature only returned proposals where the selected name(s) were assigned to proposals in the Sales Rep field. This field is now called the User Filter field. You can search proposals by name(s) that may be assigned to the Sales Rep, Secondary Rep, Sales Coord, Designer and/or Project Manager proposal fields.

(1634) City Prompt added to customer search

The Customer search function has been enhanced to include a City search field.

(1617 - 1612) Job Costing report, new filters added

Six new filters have been added to the Job Costing report. The new filters are Proposals Booked, Invoiced, Created This Week and Proposals Booked, Invoiced, Created Last Week (one option for each). Also, if you are using the Append to Proposal Number feature, the full proposal number (including the appended portion) will be displayed on the report.

(1608) Open Proposals – **New report**

The Open Proposal report is a new report that allows you to select a timeframe and sales rep name(s). The report will display all proposals that were created within the selected timeframe that have line items only (no purchase orders or customer invoices). The report includes any custom status assigned to those proposals as well as the line items total cost and line items total sell amounts.