

March 2021 Software Update Newsletter

Your site has been updated to software version 3.2.2 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.

Please reference the Dealer Choice User Manual (under the Help & Communications menu) for more information on new features and enhancements.

Features and Enhancements in this release, version 3.2.2:

(1701) – **New Feature:** Proposals Design Tab PDF

A Print icon has been added to the Design tab of proposals. This icon will generate a PDF image of all fields and data on the proposal Design tab, including your custom fields. The PDF can be saved to the Proposal File Vault or downloaded so it can then be emailed. You can also enter any title text you wish that will appear on the PDF as well.

(1700) – **New Feature:** Proposals Install Tab PDF

A Print icon has been added to the Install tab of proposals. This icon will generate a PDF image of all fields and data on the proposal Install tab, including your custom fields. The PDF can be saved to the Proposal File Vault or downloaded so it can then be emailed. You can also enter any title text you wish that will appear on the PDF as well.

(1693) **Enhancement:** Proposal Status changes can now send internal and external messages

We've enhanced the custom Proposal Status feature (System Configuration) so you can now assign specific users to receive either an internal Dealer Choice message and/or an external email when the proposal status is changed.

(1692) **Enhancement:** Open Proposal report, additional data fields display enhancements

The Open Proposals report have been updated to include several new display fields. In particular, any deposits received will be displayed with the receipt date and amount. The estimated GP% has also been added as well. Total estimated cost, sell, profit dollars, GP% and the total deposit amount received for the time frame the report is run are displayed at the bottom of the report.

(1691) **New Feature:** Purchase Orders tab, now displays Acknowledgement data

The Purchase Orders tab on Proposals have been updated to include the display of any acknowledgement data that has been entered per purchase order. If entered, the Ack Number, Ship Date(s) and Receive Date(s) will be displayed.

(1685) **Enhancement:** Account selection screen position adjustment

When entering payables or creating manual journal entries, the account selection pop-up window has been adjusted to display immediately below the selection input area being entered.

(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.