

June 2022 Software Update

Your site has been updated to software version 3.2.7 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:

(1891) – Punch invoice delete error message regarding sales tax

In some very rare cases we were seeing an error message saying "System error Current invoice tax =\$00.00 Calc tax = 0" and the invoice would not delete. This error has been corrected.

(1889) – Delivery ticket for punch purchase order says "No Active lines"

When trying to produce a delivery ticket on a proposal that only has punch lines (no Item Details line items), the message "No Active lines" would appear and no delivery ticket was generated. This has been corrected.

(1888) – Proposals – Payables tab now includes vendor credits

The Grand Total on the Proposal – Payables tab now includes (reduces) the total payable amount displayed, per any vendor credits assigned to that proposal.

(1887) – Bookings report – Exclude vendor credits option

A new filter has been added to the Bookings report called "Exclude vendor credits?". When selected, the report will not include any vendor credits in the cost amount.

(1886) – Product Sales report, add extended list price column

A new column called Ext List has been added to the Product Sales report, this column will display the total list price per product line.

(1884) – System Configuration Menu display

The System Configuration menu option has been double rendering the menu text allowing it to appear bolded. This has been corrected.

(1883) – Converting Quote to proposal error message saying proposal already exists.

When creating a quote, the quote number and quote prefix were both being changed by an end user. When this quote was then to be converted to a proposal an error message appeared saying the proposal already existed, but it actually didn't. The Quote prefix is set and stored in System Configuration and cannot be changed at will when creating a quote. If the quote prefix is changed from what is set in System Configuration, we've updated the error message stating that if you want to change the quote prefix, you must update System Configuration Quote prefix setting first. Then it will be presented as the default in the Quote creation window.

(1881) – Proposal Summary issue with split line costs

In some cases, on partially invoiced lines, the cost displayed on the Proposal Summary was doubled. This has been corrected.

(1879) – Dialog boxes converted to modal view

Previously, dialog boxes were processed as popup windows and could be moved and or minimized. This allowed for other functions to be invoked while the popup was open and active. We have changed our dialog popup boxes to modal views. A modal view is a small container for displaying information. A modal view (also called a modal window or lightbox) is a web page element that displays in front of and deactivates all other page content. This was put into place to eliminate anomalous behaviors that could result in incorrect submission of data via popup dialog boxes.

(1873) – Credit card vendor credits

As we continue to work on improving our credit card processing functions, we have added the ability to enter and apply credit card vendor credits. These credits will be applied to the credit card vendors bills to lower the amount to be paid to that vendor

Credit card vendor credits must be entered via the Vendors – Receive & Pay Bills – Receive Vendor Credits menu option. They cannot be entered from the Receive & Pay Bills window. These credits will automatically be applied to the credit card vendors bill when it is being paid, just like normal vendor credits. More details are available in the online user manual. You can find details starting at the Credit Card Process section.

(1872) – Sales tax report and non-taxable details

The sales tax report includes a column for non-taxable amounts. Now, the product names and amounts per each are displayed to detail what makes up the

non-taxable amount. Several states require this detail to be annotated. A new filter called “Display non-taxable details” has been added to the print options so you can choose to see the detail or not. Direct bill invoices are now highlighted in blue and the letters “DB” appear to the left of the invoice number. If you mouse over the highlighted line, a tooltip saying “Direct Bill” is displayed.

(1871) – Purchase Order report updates to include acknowledgement data

The Purchase order report has been updated to include acknowledgement data if desired. Two new filters have been added to support this new detail. There are now print options called “Display PO Acknowledgement Details?” and “Display Only Acknowledged PO’s?”. These filters can be used to include the display of any existing ack data and to filter the PO report to only show purchases orders that have ack data.

(1863) – Flagged for invoicing review, context menu option

For finding and reviewing proposals/line items that have been flagged for invoicing, we’ve expanded the proposal list context menu options. The context menu is available for users with ‘flag for invoicing’ and ‘invoice flagged’ permissions and is accessed by right pointer clicking on proposals in the Proposal List view. A new option called “Review flagged items on this proposal” has been added so flagged line item can be viewed exclusively. This new context menu option exists for any proposal that has line items that are flagged to be invoiced. When the “Review flagged items on this proposal” option is selected, the proposal will open to the Item Details tab and the Item Details tab will be filtered to the “Show flagged for invoicing” filter. This will display only the lines that have been flagged to be invoice to be reviewed. All proposal Item Detail tab filters are still available so you can switch your view if you wish.

(1848) – Item Details tab now includes an Extended Cost column

A new column called Ext Cost has been added to the Item Details view which will display the extended cost amount for each line item. The column is included in grouped lines subtotals as well.

(1847) – Edit file vault file descriptions

A new icon has been added to the various file vaults (Proposal, Customer and CRM Prospect) called “Update file properties”. It exists on each file that is uploaded to the file vault. The new feature allows you to edit the existing File Description text.

(1846) – Backlog report updates – added scheduled install date display

If a proposal that appears on the Backlog report has a scheduled Install/Delivery Date saved on the Proposal – Install tab, then that date will be displayed on the backlog report under the Booked date display.

(1813) – Error message text changed for punch purchase orders

Previously, the error/warning message that appeared when creating a punch purchase order that included a line missing its ship to address, mentioned missing or no lines being selected. The message has been updated to say that the ship to address is missing and the line cannot be ordered until corrected.

(1752) – New print options for pro forma document

Two new print options have been added to the pro forma document General Print field print options. They are: ‘Customer No’ and ‘Customer Acct No’. When selected, the data for these fields will be pulled from the customers database and will be displayed on the document. These fields will be displayed under the customer’s address.

(1751) – New print options for customer invoice

Two new print options have been added to the customer invoice General Print field print options. They are: ‘Customer No’ and ‘Customer Acct No’. When selected, the data for these fields will be pulled from the customers database and will be displayed on the document. These fields will be displayed under the customer’s address.