

# What's New in Propello Release 2023.3

Propello release 2023.3 includes new features and enhancements that help simplify tasks and streamline workflows so you can focus on providing an exceptional customer experience.

For your contractor customers working on several projects, they typically want to keep the purchases separate by job.

To facilitate this, we added a new Jobs feature that enables you to create separate jobs for individual projects.

This helps you keep the purchase history, invoicing, and statements separate for easy management.

When you select the Jobs icon, the system opens the Job Account Configuration page to set up your customer's job.

Once you enable the Jobs feature, selecting the Add Customer Job option from the Actions drop-down allows you to add a job account to a customer's profile.

When you add a job, it inherits the settings from the main account except for the credit limit.

We enhanced the Customer accounts using Accounts Receivable Jobs to give you options when generating statements and making payments on account.

Using the Job Statement Types drop-down in the Credit Info tab, you can configure the type of statement to print for customer accounts if they have Accounts Receivable Jobs.

You can use the Payments on Accounts page to apply payments to the main account, individual job accounts, or a combination of both.

We enhanced Import and Mass Update to add and modify customer information for recently added jobs.

We added a new Salesperson feature to the Customer Setup menu.

Now you can give salespeople credit for their sales by adding them to customer profiles and POS transactions.

You can use activity records to track the monthly revenue produced by each salesperson.

Use the Add New Salesperson page to configure the salesperson account.

We added a Sales Territory field that lets you allocate a sales territory to a salesperson.

You can also assign a salesperson to one or more users and POS clerks.

You can also assign the salesperson information to multiple records with the Customer Imports feature in the Imports utility.

You will need to enable Add/Edit Salesperson in Point of Sale permissions so that POS clerks can assign salespeople to transactions.

We added a new Combine Multiple Purchase Orders feature to the Purchasing menu.

This feature lets you combine multiple purchase orders from the same supplier into a single purchase order.

We added a new Copy Purchase Orders feature that enables you to create new purchase orders from an existing PO.

You can copy the order to one or more stores, specify alternative PO numbers, manage costs, control retail prices, and include or exclude other miscellaneous charges.

You can also cancel the original order, reset dates, and customize the destination PO type while copying.

Those are just a few enhancements made to Propello 2023.2.

Refer to the What's New document for more detailed information on all the new features and enhancements added to this release.

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