Project : Lizzy
Version : 2.2.0.2 (Final Release)
Date Release : 08-18-2010

Release Notes (Version 2.2.0.2)

- Accounting
    - Added new recurring bills module that allows you to setup companies or people you pay on a regular bases so that you can create the check/ach/debit card entry with one click.   (419)

    - Added the date created to the purchase order view control.   (1520)

    - Added new control to the check detail section that will display the list of purchase orders that were paid with that check if available.   (1332)

    - Added new controls to Accounts Receivables to view Rebates, Warranty and hold back credits.   (1218)

    - Added guard rail to prevent Chart of Account duplications.   (955)

    - Added ability to enter a prior Supplier Credit to the Account Receivable section.   (1381)

    - In order to protect Lizzy's general ledger, we've added a protected accounts process that is automatically set for certain types of accounts. This prevents users from being able to accidentally write checks to them or use them in manual adjustments.   (1495)

    - Removed the Void Check button in checking account if the check amount is already zero.   (1454)

    - If you have an email on file for a supplier, you now have the ability to email him/her a copy of your Purchase Order with the click of a button.   (1197)

    - Added ability to click on the amounts in the GL and see the departmental accounting hits that hit for that specific account.   (1404)

    - Added ability to use credits on the purchase order payment process.   (1438)

    - Fixed problem with refinancing payment amounts not matching what system thought they should be.   (1452)

    - Fixed reconcile process so that it insures balance is correct before allowing you to reconcile.   (1247)

    - Fixed enter old balance so that if a negative amount is entered it will create a credit.   (1195)

    - Added prompt when voiding checks.   (1453)

    - Hiding cash payment method when paying rebates and warranties.   (1510)

    - Fixed minor issues with voiding a check in checking.   (1451)

- CRM
    - Moved customer's birthdate field to the main contact edit screen and changed layout to make it quicker to enter and work with.   (1530)

    - Added new menu to CRM Sales to allow viewing Customer owned units. You will need to turn on security rights for your users to be able to see and use it.   (1533)

    - Added new menu in CRM section under sales to view Units owned by customer. See security setup if you don't see the menu.   (1533)

- ○ Modified manual resolving of call topics in the CRM system so that its a bit more fluid.   (1388)

- ○ Added ability to resend email to group related to a conference call. This also includes modifying the note of the conference and then resending it to everyone involved in the meeting.   (1499)

- ○ Fixed problem with sending out mass emails with the new email system.   (1493)

- ○ In order to give Lizzy the ability to associate employees to specific locations in the organization, we've added a new location drop down to the employee edit screen for having them somewhere else. This also is used by Lizzy when showing parts to pull from stock and such and will limit their list to only seeing locations that they are part of.   (1487)

- ○ Fixed problem with the "FROM" address not being visible on the view correspondence page for emails.   (1444)

- ○ Fixed additional contacts control so that it opens automatically when you view a contact to save the extra step of clicking it.   (1440)

- ○ Fixed problem with additional contacts email addresses not kicking off the new email system when clicked.   (1421)

- ○ Changed layout of new phone numbers fields to make them go across the page instead of down the page to make it take up less room.   (1411)

- ○ Added ability to have Lizzy send out the initial conference email instead of having to attach and send separately. To use, create a conference call and add the detail of the call. If needing to send things like gotomeeting information or whatever, fill it in and save. Now go add contacts to the conference. Upon choosing each, Lizzy will send them the conference notes and description automatically and will attach it to their record so that you can review the fact that it was sent and resend if necessary.   (1245)

- ○ Modified all places that display an email address to have lizzy take you directly to the integrated email system in order to send an email. This automatically links those emails to the contacts records and allows anyone in the company with access to be able to review them.   (1401)

- ○ Added telephone number types to CRM system and then allow you to enter them all at once when adding new contacts instead of having to go to additional contacts. See settings/ CRM / Phone number types for a list and you can add or tweak it at will. System will then begin showing only those numbers set to visible on your customer add screens.   (1398)

- ○ Fixed CRM Correspondence list so that you can now properly sort by employee and then scroll through list of calls.   (1407)

- ○ Changed the way you setup employees to limit one employee per actual contact record. Customer records can still have more than one login associated with them but employees can not.   (1331)

- ○ Added salesman drop down to the CRM locate screen.   (1455)

- ○ Opening additional contacts by default when viewing contact control.   (1426)

- Email
  - ○ Changed system so that now when you click the email module it will automatically clear any email alerts that you had received, saving you the extra step of clicking on them.   (1443)

  - ○ Fixed problem with receiving error when sending email to more than one person.   (1437)

  - ○ Added ability to click a link in the email and have Lizzy locate that customer's record and place me on it.   (1427)

  - ○ Made miscellaneous changes to the email system to make it work more fluidly with the other modules.

(1385)

- F&I Forms
  - Added form for Dealer Assignment Covering A Vehicle for the state of Pennsylvania   (1527)
  - Added form for Honda ATV Rider Training Certificate   (1470)
  - Added form for RPM One GAP   (1505)
  - Added form for RPM One ESP   (1506)
  - Added form for Honda Bonus Bucks - Big Red   (1504)
  - Added form for Honda Bonus Bucks - Utility ATVs   (1503)
  - Added form for Honda Bonus Bucks - Sport ATVs   (1502)
  - Added form for Honda Bonus Bucks - Off Road   (1501)
  - Added form for Application for Title - Boat or Outboard Motor for the state of Oklahoma   (1476)
  - Added Lien Entry Form for the state of Oklahoma   (1474)
  - Added form for Honda Bounus Bucks - On Road   (1500)
  - Added form for HondaCare Protection Plan w/Roadside Assistance   (1473)
  - Added form for Honda Salesperson Delivery Checklist - TRX   (1481)
  - Added form for Honda Salesperson Delivery Checklist - Scooter   (1480)
  - Added form for Application for Title - Vehicle for the state of Oklahoma   (1475)
  - Added form for Honda Setup and Pre-Delivery Checklist - Scooter   (1463)
  - Added form for Honda Setup and Pre-Delivery Checklist - TRX   (1464)
  - Added form for Honda Setup and Pre-Delivery Checklist - On-Road Motorcycle   (1461)
  - Added form for RPM One PPM   (1507)
  - Added form for Honda Setup and Pre-Delivery Checklist - Off-Road Motorcycle   (1462)
  - Added form for RPM One Theft   (1508)
  - Added form for Honda Salesperson Delivery Checklist - Off-Road Motorcycle   (1458)
  - Added Certificate of Fact for the state of Washington   (1446)
  - Added Application For Title for the state of Washington   (1436)
  - Added form for Honda Salesperson Delivery Checklist - On-Road Motorcycle   (1457)
  - Added Release of Interest / Power of Attorney form for the state of Washington   (1445)
  - Added form for Oklahoma Odometer Statement   (1479)
  - Added form for Title Application - ATVs and Snowmobiles - PA   (1511)
  - ADDED FINANCE FORM FOR TITLE APPLICATION FOR BOATS - PA   (1515)

- Added American Honda Finance Corp Agreement   (1471)

- Added Oklahoma Lien Entry form   (1477)

- Finance
  - Added Finance Source specific fees (Membership and VSI)   (1538)

  - Added ability to charge finance charges with finance sources on Finance deals.   (1537)

  - Implemented Prepaid Finance charge calculations.   (1536)

- General
  - Added new field to enter a general description of units to the model information.   (1540)

  - Added features to Lizzy's calendar to keep track of customers needing to be called when their service work is done. If the service has an email attached Lizzy sends notice to customer and schedules call back for 2 days later. If no email is assigned then she'll schedule the call back for today.

    From the calendar, you can click to open the link and then click the log call button to have Lizzy automatically log and process the call quickly. This logs the history to the customer's correspondence logs as well.   (1146)

  - Fixed problem with reseting employee or customer passwords and Lizzy not sending out the email to notify them.   (1497)

  - Fixed problem with videos on nizex.com not playing properly in IE.   (1431)

  - Revised the way Lizzy displays training videos so that they now come up inline instead of popping up additional windows.   (1362)

  - Added ability to choose from multiple alert sounds in the users profile.   (1441)

- Inventory
  - Added new report to the inventory section to see a list of all the items that have been adjusted in or out of inventory manually between the selected dates. This will give me an idea of how accurate my inventory is being tracked as manual adjustments should technically never happen.   (1521)

  - Fixed Lizzy so that if you were to change the account number on an item, it will properly hit the GL to move the part costs.   (1010)

  - Fixed problem with duplicating price matrixes to use on other vendors or levels.   (1489)

  - Changed the drop down to select a bin location to an intelligent search control. This speeds up selecting bin locations and allows Lizzy to support thousands of bins if needed.   (1490)

- Invoicing
  - Added interface to Federal Express to the shipping processes. Refer to setup videos in Learning center for specific information on setting this up and taking advantage of it.   (1541)

  - Added ability for Lizzy to display rows in Red if the unit is already attached to a deal. NOTE: This functionality is only for newly attached units so if you have old deals sitting around that have not been voided or completed and the system is not showing those units in red, its because they were attached to the deal prior to Lizzy having this new functionality. Voiding or completing the deal will fix the problem there.   (1450)

  - Modified view control for units so that they will show Red if they're already attached to a final deal somewhere.   (1450)

  - Added ability to view Unit Sales/Service History directly from Service Ticket. Review Security section for

Serialized / Units / View Current / Allow User to View Unit History and Invoicing / View Current / Allow User to View Unit History for turning on ability of users to use this new function.   (1534)

- ○ Fixed Lizzy so that if a mechanic choose one of many jobs on a service ticket, Lizzy will not automatically select that job when the service ticket is open, allowing them to click once to start time instead of having to select the job a second time.   (1519)

- ○ When a service ticket is paid, Lizzy will now automatically remove in current or future call backs that might have been scheduled from the calendar.   (1494)

- ○ Modified the bill to processes on the invoice so that they work better with all the extra finance and AR features on the payment screen.   (1456)

- ○ Fixed problem with Invoice check price control.   (1347)

- ○ Modified the Work Order printout so that long company names don't run over other elements on the form.   (1395)

- ○ Rewrote the sales tax report processes so that you now can setup different reports and then choose which taxes you want to be a part of each report. This enables you to run reports for different states and have Lizzy track out of state and such for you automatically.   (1394)

- ○ In an attempt to make the invoice totals make more sense from top to bottom, we've removed the Other Charges from the totals page and now display those totals as part of taxable non taxable amounts.   (1375)

- ○ Added ability to sort the mechanic service list by the date promised to see what has been promised that we've missed out on deliverying. To use just click the check box and the list will sort automatically by date promised instead of the date scheduled.   (1518)

- ○ Added ability to attach images to both service tickets and warranty claims.   (1535)

- ○ Added ability to view Purchase order and invoice information directly from the Special Order List control.   (1498)

- ○ Modified message that is sent to customer so that it makes more sense when there is no vin/serial that was attached.   (1512)

- ○ Added additional detail fields to the unit information on the invoice.   (1442)

- ○ Added ability to quickly add new model information to the system via the add unit control instead of having to do it separately.   (657)

- ○ Fixed issues with taxes not displaying correctly on Finance page of invoice.   (1295)

- ○ Added check number to the payment receipts.   (1428)

- Payroll
  - ○ Added personal day approval control.   (1496)

  - ○ Added new report to payroll section for employee detail.   (925)

- Settings
  - ○ Modified the Settings / Shipping controls to allow for defining packages, then defining shipping methods and then linking them together to be used on the invoice to ship products.   (1529)

  - ○ Added ability to turn on and off "Use Returns Bin" in Inventory Settings. This feature will cause Lizzy to move parts from the counter that came in as a return from a customer, directly back into inventory, or to place in a returns bin that must be processed later. Smaller dealerships might want to have it go directly

to save the extra step. Lizzy defaults to using the bin which is what its been doing from the beginning. (1514)

- Modified the settings / inventory /setup bins control to allow choosing specific location for the bins. System defaults to "In Store" if you don't set it. (1486)

- Added ability to create multiple locations such as In Store, Warehouse A, Warehouse B and so forth in settings inventory. These can then be linked to specific bin locations when creating bins so that you can now have bins all over the place and lizzy will track your inventory in each. (1485)

- In order to have Lizzy manage the accounting processes a bit better, we've moved some of the default fields that use to be attached to units, over to the supplier record itself. Lizzy will use these accounts when working with purchase orders and such so please insure they are set correctly for your dealership by viewing all supplier records and edit the record in order to display what is set. (1482)

- Added new internal table to start tracking all of the interface types for the purchase order sections. These will be the choices available as we add more and more interfaces to send orders to. (1433)

- Revised the mechanic pay rate control in settings to make it work a bit better than before. (1360)

- Units
  - Added new history button to the RO to be able to view the complete history on a unit with one click. This includes being able to open up the actual invoices and service tickets themselves and view them in line on the service ticket. (1513)

  - Modified the add new unit to the serialized goods section so that the model number is a search box instead of a drop down list and the control now uses the processes we created over on the invoice in the last release. (1435)

Modules effected by this release :

Module	**Version**

Current Versions of all Modules related to project :

Module	**Version**	**Date**