

Project : Lizzy

Version : 2.3.0.1 (Final Release)

Date Release : 02-09-2011

Release Notes (Version 2.3.0.1)

- Accounting
 - Running balance in the Check Register was wrong on pages 2 , fixed. (2498)
 - Added ability to tag a supplier with a minimum order amount and have Lizzy flag user when they attempt to order a PO with less than that amount to let them know they will have to pay shipping on that PO if they order it. (2418)
 - Fixed problem where the AR Aging report was not totally correctly on the 30-60 group. (2213)
 - Lizzy now lets you deposit entries that add up to \$0.00 in the deposit module. (2434)
 - Fixed overlapping description in the PO receiving report. (2060)
 - Fixed problem with expense po suppliers showing multiple times in the drop down list. (2276)
 - Fixed problem with customer credits being entered with wrong due dates. (1006)
 - Added ability to print barcodes. (1934)
 - Added CODIS interface for ordering purchase orders. (743)
 - Fixed changing costs on refinanced PO so that hit hits the GL properly. (1628)
 - Added new COA Wizard updates to account for standard categories. (1921)
 - Added new sales history view control to the purchase order view and edit pages. (1758)
 - Fixed problem on PO where it was not properly viewing the sales history for an item. (2029)
 - Enhanced the General Ledger search control to allow for more flexibility. Also added new export to excel process. (2016)
 - Fixed problem with EFT process not adding the bank account number on all records in the file. (1999)
 - Fixed problem with putting Account # on the PO and it not saving it.(2171) (2171)
 - Added new Paid Unit Report. (1812)
 - Added Daily Cash Drawer Report to separate by Till (913)
Report is found in Accounting / Reports/ Cashdrawer Till (913) (913)
 - Added printing the address of the customer when their are set to drop ship on the printout of a P.O. (1969) (1969)
 - Added new Parts Unlimited interface to PO system. (1869)
 - Added option when bringing in only Used Serialized Items on a P.O. to be marked as Used. Go to Settings > Accounting > Defaults and scroll down to the payable section and check mark" Default Serialized Items as "Used" when adding to Purchase Orders" and Save (1953). (1953)
 - Added ability to change a payment type to correct an error of a wrong payment taken on an Invoice. Option is found in Accounting / Deposits / Undeposited Funds (1118) (1118)

- When changing a payment type on an Invoice, it now attaches a note to the Invoice to reflect what payment type it was changed from and to, date it was changed and who made the change. (1120) (1120)
- Fixed problem with negative deposit generating a check# in the system. (1384)
- Fixed problem with undoing multiple PO items. (1870)
- Added new PO type to create a Spring Order to place parts on that we're not ordering immediately but want to start building it up. (1626)
- Fixed AR Payments on Payable refunds/credits so that it updates the PO payment information and balances automatically. (1611)
- Fixed error message when voiding a deposit. (1590)
- Changed the way you select bin locations on refund PO's. It now shows drop list of actual bins the part exists in instead of listing all bins. (1604)
- Added two new P.O. types under Locate an Order screen of Spring Order and Special Order (1341)
- When adding items to a PO, Lizzy now hides inactive parts. (1781)
- Added ability to the P.O. section to Undo received Line item, Undo Received PO, Cancel part from PO, and Cancel Entire PO. (980)
- Check number now shows on the receipt when paying AR with a check (1688)
- Add the ability to add Color to a Unit PO, per line item. (1707)
- Fixed error that occurred If you pay multiple P.O.'s with 1 huge credit & where the credit is less than the total amount of P.O.'s being paid. (1616)
- Expense Refund PO's can now be made and posted to A/R. (1613)
- Added ability to do a Part Refund PO. Accounting > Payables > New Refund Choose Inventory Refund & add parts, choose bin location that parts will get pulled from & when ready, go to the last page of the PO wizard and click "post refund" . (1608)
- Calendar
 - Cleaned up calendar alerts and windows. (2120)
 - Added advanced dashboard that shows specific user related items that have gone on during a certain day and also added ability for management to view other users dashboards. (1816)
- Chat
 - Revised and enhanced the chat window within Lizzy. (2150)
 - Reworked chat popup boxes. (2182)
- CRM
 - Added processes to employee records to prevent you from being able to deactivate them from anywhere but on the additional contacts page of the wizard. This is because in most cases we need to merge their records assigned to them to a new employee and this is where that gets done. Once you have merged and deactivated them you can turn off their active field. (2613)
 - Changed Mass email system so that it now goes to the new email module when sending out emails and it also allows for spell checking and attachments from there as well. You can also utilize the form email system. (2582)

- Added new subscribe field to the mass email system. This allows you to set certain contacts as not interested in receiving them and Lizzy will skip over them during the process. (2235)
- Enhanced unit model number control to allow selecting industry/year/make/model and integrated it into the new master model system. (2223)
- Fixed Lizzy so that if you select a vendor as a supplier and manufacturer it will automatically add them to the supplier list below on the CRM setup wizard. (2197)
- Added new search control to the CRM Manufacturer setup that will automatically attempt to locate the master vendor record you are looking for as you type. If you see it in the list just select it and save the time of having to type it. This also links that CRM record to the actual master vendor record to enable a lot of other features for you automatically. (2222)
- Fixed call log report so that the view doesn't show the same call listed 3 times just because there were 3 topics on it. (2217)
- Added ability to specify exactly which additional contact should receive email invoice copies when they are sent out. Set in CRM Module. (1925)
- Added new master model number processes to help link things together. (1928)
- Fixed problem with not refreshing additional contact control when removing entries. (1841)
- Added new master model system to Lizzy. (1867)
- Added ability to choose which fields you'd like to export when exporting contact list on the search page. (1845)
- Changed email correspondence page. (1840)
- Added new message to confirm you wish to send out a mass email to the CRM locate screen. (1780)
- Modified the CRM Call log report so that it now will show you the actual call log when you click on the record, or you can click the view button to actually go to that customers record. (1694)
- Added address information to the popup that opens on the CRM locate screen if you click on their customer id. (1692)
- Fixed problem with conference calls not setting the ending date properly. (1607)
- Added ability to add employees to conference calls and have them be able to manage the conference themselves to add and remove customers. (1621)
- Lizzy now looks up address and phone numbers when entering on new contact record to let you know if another contact record already shares those items. (1789)
- Fixed problem with rejecting a ticket in CRM and it wasn't refreshing the screen. (2187)
- Added ability to add a credit limit for A/R customer. When the credit limit is set up and it is exceeded, a message will appear to alert you. (967) (967)
- Added the ability to add the Tax Exempt Permit Number in CRM under Step #7 for a State of Washington requirement. (1316) (1316)
- Added new Resend button to view correspondence that will resend an email. (1979)
- Fixed problem with additional contacts wizard not saving user roles properly for logging in. (1945)

- Fixed problem with customer default discounts not being reapplied after the price of an item is adjusted. Now when you add the part to the invoice it will auto correct the changes to reflect the proper discount amount. (1423)
- Added ability for Lizzy to auto create account numbers for you for suppliers and manufacturers. To use lookup the supplier/manufacturer and click the wizard links beside each set of account numbers. Lizzy will then create auto accounts for you and link to that supplier record for future processes. (1572)
- Fixed issue when adding a bill to or ship to address that is different than the customers address it changed the customers zip and state of what you entered for the ship to or the bill to. It correctly saves the correct customer and bill to information now. (1690)
- Updated the Manufacturer & Supplier controls to put the Supplier up top. (1623)
- Dashboard
 - Added new date field to advanced dashboard to allow selecting what day you'd like to view. (1929)
 - Added new master model count to dashboard to show how many model numbers were added by each employee. (1912)
 - Added emails sent out to the advanced dashboard to keep track of how many emails have been responded to by each employee (1863)
 - Added new Advanced Dash board that will show you a number of things about your day as well as (if you have permission) see information about other employees day. (1742)
- Email
 - Added ability to flag certain emails as private which will stop anyone else in the company from being able to view them unless they were specifically sent to them or they have security privileges to see them. (2240)
 - Fixed problem in email system where it wasn't paging correctly. (2051)
 - Fixed problem with trying to send email to everyone in a group in the address book of email system where it was not sending to every person in the group. (2006)
 - Added new spell check system to the email creation control. (1986)
 - Fixed error 3356 when replying to a customers email. (1948)
 - Fixed problem with email folders in the email system. (2005)
 - Fixed the issue with not being able to view the Email Attachment (1826)
 - Corrected the issue with email receipts not having the correct invoice number in subject line. (1651)
 - Fixed error that was appearing while deleting spam emails. (1640)
- F&I Forms
 - Added the IL Boat Registration Application (IL422-0321 1/10) form. (2177) (2177)
 - Added the IL Odometer Disclosure Statement (VSD 333.3) form. (2160) (2160)
 - Added the IL Odometer Disclosure Statement (VSD 333.3) form for TRADE INs. (2161) (2161)
 - Added the IL Power of Attorney (RT 5.10) form. (2162) (2162)
 - Added the IL Power of Attorney (RT 5.10) form for Trade In Units. (2163) (2163)

- Added the Bill Of Sale (reg 135 (rev. 2/2007)) form for the State of California. (1910) (1910)
- Added the Power Of Attorney (reg 260 (rev. 3/2007)) form (1909)
- Added the Application For Title (reg 343 (rev. 8/2008)) form for the State of California. (1911) (1911)
- Added the Honda Financial Services (HFS) Goods Contract for the State of Ohio (1648)
- Added the American Honda Finance Corp Retail Installment Contract for the State of Ohio (1465)
- Added the American Honda Finance Corp. Notice to Cosignor (1472)
- Added the Honda Financial Services Notice To Co-Signer form (1646)
- Added the Honda Financial Services GAP Disclosure form (1644)
- Added the Honda Financial Services Certificate of Delivery and Acceptance of Vessel form (1643)
- Added the HondaCare Pre-Owned Checklist (1639)
- Added the HondaCare Customer Features Checklist (1638)
- Added the HondaCar GAP Agreement (1469)
- Added the Honda Care GAP Waiver (1632)
- Added the HondaCare Protection Plan w/Roadside Assistance (1629)
- Added the BMI Federal Credit Union Retail Installment Contract for the State of Ohio (1622)
- Added a Generic Retail Installment Vehicle Contract by Bankers Systems (1612)
- Finance
 - Converted Major Unit model types to using our new master model number system. (2048)
 - Added new View Deal control to the view invoice page that allows viewing detail of deal from invoice itself after its closed. (1852)
 - Added additional fields to the trade in screen to allow for greater detail. (1924)
 - Fixed problem with F&I forms not printing correct form after invoice has been completed and processed. (1633)
- General
 - Added process so that Lizzy will now update all GL entries automatically if you change account numbers on vendor/supplier or categories of items/units. (2208)
 - Added new tooltip bubble and cleaned it up a bit on the service schedule incoming. (2336)
 - Reworked the way Lizzy communicates alerts and have it now using an image instead of textual information to simplify the header page and clean things up. Added hint to icon that if you point to it it will give you the same information as before. (2186)
 - Added company logo to email signatures and invoice printouts. (2053)
 - Added ability to collapse the main menu on the left when needed to provide for more room on the page. (2055)

- Added new process that will stop any time on any tickets/invoice/service that you might be doing when you click out on the time clock. (2198)
- Added new pre-converter to help with converting customer over to Lizzy from other systems. (1864)
- Added new left menu for clear blue template. (2183)
- Fixed problem with the new item locate screen not properly handling item aliases. (2225)
- Redesigned the top menu and added a new template to the system called cool blue. You can select it in settings/security/my profile. Exit and reopen browser after saving to refresh browser. (2104)
- Modified the paginating controls throughout Lizzy so that you can now specify a specific page to move to. (1581)
- Added process where Lizzy will stop your time automatically if you clock out to go to lunch on PDM tickets. (895)
- Fixed the Alert bar staying up after viewing alert. (617)
- Inventory
 - Added new future service inventory report which will show you all the service jobs that are out there and what parts need to be ordered for them to help stay ahead of service. (1704)
 - Fixed problem with polaris price file where they are putting a "J" in the place where a decimal should be. (2456)
 - Changed inventory list report to order by part number. (2357)
 - Inventory report was not showing parts that had zero quantities so fixed it so they show as well. (2377)
 - Fixed problem with adding a new part manually to the system and it was hitting the GL for the day before. (2300)
 - Fixed Delete Supplier parts routine so that it doesn't remove items that are on invoices already. (1670)
 - Added ability to track inventory by location and limit the views on certain screens to only that of the employees location. (1710)
 - Fixed problem with inventory header printing over other items if too long. (1665)
 - Added guardrail to prevent creating internet or catalog type invoices if you do not have a full address for the customer. (1591)
 - Fixed error when adjusting a part in the Adjust inventory form. (1817)
 - Fixed issue with the incorrect P.O. showing when looking up a part that was promised and received. (1721)
 - Added Helmet House price records to the master price files. (1829)
 - Added Western Power Sports to Master Price records. (1828)
- Invoicing
 - Fixed problem with customer receipts overlapping customer information. (2617)
 - Added current contact name into the popup bubble on existing service tickets. Older version was only showing service ticket ID and not the actual customer it was for. (2427)

- Fixed 404 error on tax report. (1706)
- Added new Quick Login/Out feature to the invoice page that allows sales reps to switch users without logging out and back in. Must be turned on in company settings. (1890)
- Fixed problem with invoice signature line printing over top of the totals box on invoice. (2273)
- Added ability to print the customer account number field supplied in CRM system to the invoice printout. (1881)
- Added new Internal notes section to the notes page of invoice that will not print but will stay visible on the screen. (1888)
- Added ability for Lizzy to read only style TBA barcode labels to prevent having to reprint all the old labels. (1933)
- Added customer name to service schedule incoming screen. (1930)
- Added new service ticket quote and made sure that it does not allocate items or try to order items that are added to it. (1237)
- Added new date field to the recurring invoices control and fixed where we can edit it. (1865)
- Added prepaid Maintenance (PPM) Processes. (1311)
- Added ability to create Rental Invoice Types and handle rental equipment in Lizzy. (1689)
- Added new note control to recurring invoice section to allow adding notes that can be viewed on the next billing cycle. (1860)
- Added new Rental units to the serialized section. Also changed printouts to show rental units. (1725)
- Fixed problem with wrong payment methods showing on invoice printout in certain situations. (1793)
- Added new Tool Tracker to the service tickets that will allow tracking time on things like fork lifts, trucks and so forth. (1663)
- Added new field to the recurring invoice processes that will allow you to enter an expiration date on the invoice so that you can't use the record past a certain date to bill out. (1695)
- Added new Gift card module to allow purchasing and using gift cards. (1634)
- Fixed problem with wrong email copy being sent out for customers. (1681)
- Added ability to drop ship orders directly to customer in the invoice header. Checking the box will cause the system to create a separate PO for that customer and will show the drop to information when sending to the vendor or printing. (1645)
- Fixed problem with Lizzy sending customer copy of wrong invoice when using email process. (1641)
- Fixed bin locations control to only show bins for the employees default location which is set in CRM module for each employee. (1636)
- Hid Job Complete icon when dealing with Estimates (1642)
- Fixed problem with invoice wizard showing items page in wrong step. (1944)
- Fixed problem with viewing service history where it opens an invoice copy up inside another invoice copy and was resetting the current invoice number with the new one. (1943)

- Added new service scheduling processes to the mechanic screen. (1703)
- Modified service scheduler a bit and added new features. (1702)
- On Special Order Invoices the shipping is now carrying over to the 2nd invoice correctly. (1170) (1170)
- Added ability to discount by % on the items page. Select the % icon under the discount column and it brings up a grid to discount that one item or can select discount all items on that Invoice. (970)
- Added guardrail to prevent you from closing out deal without the vin number being entered for any trade in items. (802)
- Changed invoice schedule time format to allow for scheduling up to 30 minute increments. (1913)
- Added ability to refund a Unit Invoice by adding an option " Refund This Invoice" on screen. It will then create the refund invoice automatically. (1759)
- Fixed error with Chrome not showing payment types. (1868)
- Fixed issue where you couldn't edit a Unit if you had put a rebate on it. You are now able to click on the notepad next to the Unit & edit it. (1314)
- Added new note field to the service tickets for mechanics. This is an internal only field that mechanics can use to enter details about the job. The service writer can then transfer the necessary information to the actual service performed field for the customer to see. (1757)
- Fixed problem on invoice printouts where the city and state were not showing up for sales in other countries. (1683)
- Added ability to print a general invoice even if it has not been paid. Added QUOTE note to top of invoice printout. (1650)
- Fixed adobe error when printing an Invoice. (1658)
- Added ability to turn off alerts to customers when service tickets are completed. Found in Settings/Invoicing/Defaults. (1630)
- Added ability to take an overpayment with Credit Cards or Checks & give the customer a credit on A/R (1315)
- Fixed issue with printing invoices from locate invoice screen. Invoicing > Locate Invoice > select customer> will show all their invoices & then have option to "Print Results". (1792)
- Added the option to UnComplete a job. A new icon has been added that looks just like the one used to mark a job complete, except this time it will have a red check mark instead of green. The only stipulation is that you can't unmark a job as complete if the Mechanics Performance Report has been run on this job, otherwise it will display the new icon in the actions column. (1755)
- Added ability to purchase Gift Cards on Invoices. First you will need to create an inventory item for Gift Card, create an invoice, enter the part number for the gift card and enter an amount to charge. Click on Gift Card & scan it then go to Payment form & take payment (1548)
- Fixed the issue with extra parenthesis on the payment detail. Now will correctly show the last 4 digits of the credit card in parenthesis and for a check will show the check # in parenthesis. (1664)
- Fixed issue with line 3 and 4 of company address overlapping. (1722)
- Fixed error when removing units from unit sale invoice. (1696)

- Fixed the overlapping issues on Disclaimers and Notes & Terms on invoices. (1656)
- Fixed error when delivering special order parts with a ' in the description. (1637)
- Fixed issue with Notes and Terms not printing on Invoice PDF. (1610)
- Fixed issue with invoice printing 10 semi blank pages. (1635)
- Added a link to print receipt after the sale completes on Special Order invoices where no money was collected. (1558)
- Added ability to add money to gift Cards. (1556)
- Added ability to sell Gift Cards (1552)
- Fixed the issue with the second invoice on Catalog Sale not showing Credit (1606)
- Added modifications to have the disclaimer print fully on each page on service tickets with multiple jobs and disclaimers. (1598)
- Fixed error when overpaying an Invoice. (1592)
- Payroll
 - Fixed problem in California payroll system where it was not taking out all the needed taxes. (2424)
 - Fixed payroll pay stubs so they are now showing all needed information. They were not properly displaying deduction information before. (2257)
 - Fixed problem with Wisconsin sales tax. (2139)
 - Added new 2011 tax tables to Lizzy. (2149)
 - Fixed problem with Payroll module where deduction items were duplicating on the paycheck in some situations. (1963)
 - Fixed problem with Payroll module where if you attempted to generate checks for more than one person it was presenting an error. (1957)
 - Fixed a few problems with the Payroll 940 report. (1723)
 - Fixed problem with time sheets showing wrong information for a specific date. (1754)
 - Added new note field to the time clock to store why an adjustment is being made. (1649)
 - Added warning to payroll module to let you know you're adding another pay item during a period where one already exists. It doesn't prevent you doing it, just warns in case you were not aware. (506)
 - Fixed problem on time sheets related to time change. (1922)
 - Fixed alert process when submitting Expense reports in the payroll module. (1655)
- PDM
 - Fixed problem with note replies not being indented properly. (2134)
 - User Productivity report was fixed so that it will now print from previous year if needed. (1946)
 - Added new alerts for future release ticket items. (1745)
 - Changed the way tickets are sorted in PDM module. (1779)

- Corrected the font size of links inside of notes. Links are now the same size as the text surrounding it. (1672)
- Sales
 - Added New Interested Model Number control to the correspondence form to allow entering model information a customer is interested in to later run reports and locate units by. (1227)
 - Added new interested units control to the units page. (1727)
- Service
 - Reworked schedule incoming processes to reflect new ability to setup hours of operation as well as time frequency to show on the page. Found in Settings / Scheduling section. (2476)
- Settings
 - Fixed error when trying to enter unemployment information into the payroll setup. (1947)
 - added guardrail to hours setup in settings so you can't choose 9am-6am... (2605)
 - Fixed payroll setup so that the state drop down only shows states you've setup instead of all 50 states. (2008)
 - Fixed problem in payroll module where the state unemployment numbers were not maxing out properly. (1949)
 - Added ability to tell Lizzy to set the stock number to be the last X digits of the VIN/Serial number. (2544)
 - Added new hours of operation control to settings. This control now ties directly into scheduling system. (2428)
 - Added contact name and title to the payroll reports. (2376)
 - Added new mechanic classifications process to the mechanic setup that will allow you to narrow down the scheduled work based on whether the mechanic can perform it or not. You can also classify based on brands of equipment being worked on. (1699)
 - Added new WYSIWYG editor to the form email setup control in settings. (1985)
 - Fixed payroll setup problem where unchecking a checkbox for "always add item to paycheck" would not save it being unchecked. (1956)
 - Added new control for setting Rental Times up in settings. (1942)
 - Added new telephone formatting options to general settings. (1838)
 - Added ability to setup regular automatic emails that get sent out based on different processes. ie: If you complete a service ticket Lizzy will send the customer an email thanking them for their business. Or if they buy a new unit from you it will send them an email thanking them for that purchase. (961)
 - Fixed problem with stock number increments for units. (2175)
 - Added ability to add default Shop Materials and EPA charges on Service Tickets. To setup defaults - go to Settings > Invoicing > Defaults. Scroll down to the Shop Materials section. (1172) (1172)
 - Added ability to attach parts when adding a Job Template. When you hit add template it automatically opens up the add items area. (1179) (1179)
 - Updated the Change group discount setup. Settings > Scheduling > Setup discount groups & you are able to set a discount group from 1- 5 persons...then 6-10, & 11-25 with a discount rate. (1660)

- Added new advanced scheduling system under Settings / Scheduling. Then entire process will be documented in future training videos. (1593)
 - Added ability to classify a job template as to the level of experience a mechanic needs to have in order to complete it. This information will then be used in order Lizzy to only show mechanics capable of doing the work when scheduling. (1700)
 - Added default Gift Card / Gift Certificate Liability Accounts in Settings> Invoicing> Defaults (1562)
 - Added the ability to set the expiration date for gift cards in Settings> Invoicing > Defaults (1555)
 - Units
 - Fixed serialized locate screen so it now remembers previous entries when it is reopened. (2365)
 - Added new Major Units Sales History report. (1034)
 - Added new link to the view serialized unit page that allows you to link the current contact to that unit to signify they are interested in it. (1964)
 - Added new VIN decoding process that will allow Lizzy to determine if you are entering number correctly for certain brands of equipment. (1740)
 - Added additional options to the Serialized Goods Inventory report. (1675)
 - Fixed problem with missing unit types in locate unit screen. (1936)
 - Added ability to upload video and pictures to major units. The information will be used in future webstore module that will allow viewing for customers. (1676)
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Modules effected by this release :

Module	Version
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Current Versions of all Modules related to project :

Module	Version	Date
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