Project : Lizzy

Version : 2.4.1.0 (Final Release)
Date Release : 05-09-2012

Release Notes (Version 2.4.1.0)

- Accounting
  - Added 2 options in Settings > Accounting > Defaults:
    - Use Departmental Accounting
    - Use Departmental Popups
    (14230)
  - Process Received Units control has been updated now is a single save button that updates the VIN record as they are entered. (14198)
  - Created a COD check report that shows what the checks are that are marked as COD. (15535)
  - Cash Drawer Till Report now exports to CSV spreadsheet file. (14593)
  - Added ability to search by description on P.O.'s when adding parts. (14851)
  - Added new report to accounting / reports / Currently On Order that allows customer to choose a supplier (same drop list as the receive po control), then displays PO#, Date Ordered, PO Total and

supplier (same drop list as the receive po control), then displays PO#, Date Ordered, PO Total and then a list of each part on that PO, then the next PO and its parts. All on a single report. (15637)

- In the view invoice control, a link to the check # was added. Clicking the link will take you to the check. (16415)
- Added a lock down to the cost on the refi line item. It now allows the Lizzy user to add a line item and choose the account they want to hit. (14632)
- Added a drop list to locate a PO by Shipment Method. (15555)
- Modified the dated Receivable and Payable reports to run off the gl so they match the financials. (13690)
- Legend added on the PO locate list for the red (next day) and blue (2nd day shipping) colors. (15582)

- Contacts
  - A form email will now be generated if you get no contact or an answering machine when logging a call to a customer against a support ticket. (13160)
  - Added description when you view a conference call and click the link. (17180)
  - Customer Purchase History Report added. (15699)
  - Added due date options (like end of month, day of month, # of days) and an option to use invoice date or recd date in contacts when adding supplier information. (13774)
  - The business name fields are on both the bill to page on the invoice as well as on the contact record when editing. (14927)

- Dashboard
  - Added dashboard alerts for items that need immediate review. (9358)
  - Added a feature to Lizzy that will hide all calendar events, pdm, crm or service in the scheduled summary of the home section if all items under that group had a 0 count (nothing scheduled). (14264)

- F&I Forms
  - Added the Redline Performance In-House Bill of Sale. (15352)
  - Added the Suzuki MSO. (17648)

- Placed the Tire Disposal Fee on a separate line.
  (16180)
- Added the Golden Plains Credit Union Retail Installment Contract (Form 518GPCU - 07/11 Kansas).
  (17972)
- Added the Golden Plains Credit Union Required Documents List (Revised 11/21/2011).
  (17983)
- Added the Golden Plains Credit Union ACH Funding Request Form (Rev. 10/11/2011).
  (17987)
- Added the Meritrust Credit Union Retail Installment Contract by Wolters Kluwer (Form RSSIMVLAZ-KS 9/14/2001).
  (18000)
- Added the PA MV-1 (4-10) Application For Certificate of Title.
  (17768)
- Added the PA MV-4ST (4-10) Vehicle Sales and Use Tax Return/Application for Registration.
  (17684)
- Added the Polaris MSO. (17650)
- Added the Yamaha MSO. (17649)
- Updated NYS DMV DTF-803 form in Lizzy. (17654)
- The top of the secure odometer form is now filled in for trade-ins with xxxx's marking the spots. (17461)
- Added the Manitou Boat MSO. (16981)
- Added the Karavan Trailers MSO (dealer name on front). (16995)
- Added the Karavan Trailers MSO (BRP info on the front). (16996)
- Added the Indiana Used Title Reassignment form. This form has the Dealer Info on the LEFT and Purchaser Info on the RIGHT in the Reassignment sections.
  (16832)
- The Total Down Payment field in the Fed Box now includes the Net Trade Allowance when it is a positive but NOT when it is a negative. (16946)
- Added the Triton Trailers MSO. (16834)
- Added the BRP-SeaDoo Boats MSO.
  (16833)
- Added the BRP-SeaDoo PWC MSO. (16835)

- Updated the Honda Bonus Bucks forms to the March 31, 2012 version. (16696)
- Added the Ducati Pre-Delivery and Customer Bike Delivery Checklist. (15350)

- Finance
  - Added a Previous Loan Balance field. (13440)
  - Re-tooled the Deal breakdown section in Step 8 of a Major Unit Sale/Quote. (13745)
  - Added restrictions on who cashiers out a Major Unit Sale Invoice. (15128)

- General
  - Added a search for contacts by date created feature. (15890)

- Interfaces
  - Created controls for Partsmart interface. (11934)

- Inventory
  - Adjustments made to Items Sold Report. Report is now picking up invoice refunds. (18108)
  - Added ability to select items to build a kit. (16242)
  - Eliminated the ability to run an entire price list. User can still run an Inventory List Report when the instock button is checked and the manufacturer is selected. (11569)
  - Added Manufacturer selection to Top Selling Items Report. (15663)
  - Added the bin (store location) to the adjust inventory view list. (16746)
  - Added to Inventory List report - added option for only consignment parts. (17109)
  - Added a "To be Pulled" field to the item movement control to show when a part is sold on an internet/catalog invoice, that it's going to be pulled. (15118)

- Invoicing

- Added upload photo link to the items list and units attach screens on the Product Purchase Invoice and the Used Unit Purchase Invoice. (15147)
- Added an option to collect a signature when charging to AR. (15449)
- Added "Force Order", "Drop Ship" and "Quantity on Hand (QOH)" check-boxes to the items list on an internet invoice. (17758)
- Added ability to show the retail price of the parts for any invoices that are tagged as wholesale. (17107)
- Added function for attaching 3 pictures to a service ticket. (14570)
- Created a GST Tax Adjustment account for Canadian dealers. (16380)
- Added a new control to the service ticket view screen that shows a list of mechanics per job that worked and logged time on it. As it lists each job it shows mechanic name, date and amount of time he worked on that job for each instance. (16968)
- The amount of the deposit on a rental invoice now displays to the right of the invoice number. (17029)
- New security added to Invoicing > General Invoices > Paying Invoices > Allow overriding Lizzy processing credit cards. (17143)
- Purchase Order number and notes can be added to the invoice after it is cashed out. (15113)
- Added ability to capture credit card signature to full page invoice, work order or service ticket. (16184)
- Added feature that will allow Lizzy user to enter beginning balances on a gift card. (10571)
- Transaction Total added to bottom of each page of Invoice. (16986)
- Tax rate set to Company's default tax rate for invoices attached to General Contact. (15427)
- Added delivered date under the unit VIN on the view invoice screen. On invoice locate, if all units on open unit sale have a delivered date then highlighting the row light blue. Added blue icon to legend above the locate grid. (14894)
- Added ability to search for items by description on the invoice. When turned on it will show a new field on the invoice for the selected users. (14277)
- Added a new control that shows inside the edit job control that shows a list of parts that are unassociated to any job with a checkbox that allows me to quickly associate it with the current job. (10303)
- Added an option on a Special order part to "Red Label" the part so parts people know that the part needs to be Next Day Aired. (10771)

    - Lizzy added Replace By and Reference controls to Check Item Price. This will allow you to search for cross reference items for the current item being looked up. (15553)
    - Changes to Lizzy that affect jobs/parts on unit sales:
      1. If a part is order or delivered and on a unit sale, the job droplist can be disabled.
      2. The job list - on unit sale, will now reflect "void" instead of "()" if no internals.
      3. Any changes to parts or labor on internal will update the unit sale. (14876)

- Payroll
    - Added an option for selecting the date for posting the tax liability report payment. (14168)
    - Modified the 940/941 reports to include tax liability payments. (12807)
    - Added the functionality that if you make a direct deposit batch a prenotification, you have to check an additional box to process it - otherwise it stays available to be processed again. (17063)

- PDM
    - Added a checkbox to the locate ticket screen that will allow user to only look at tickets for the current customer. (17281)
    - Added a "quick locate" feature on View Ticket lists. (6680)

- Sales
    - Added a Total to the bottom of the Unit Sold Report for Sold For and Cost. (18143)

- Service
    - Service Ticket view and print controls now show "items" in the "other" box. (13236)

- Settings
    - Added new checkbox 'Only Email....' and tells Lizzy to wait until all S/O items for that contact are in on an invoice before emailing. (16165)

- Units

- Added ability to locate a contact on Add Unit control. (16601)

Modules effected by this release :

Module	Version

Current Versions of all Modules related to project :

Module	Version	Date