◈ **Accounting**

○ When entering bin&amp;#039;s for transit and internet in a warehouse environment, we added ability to enter I+bin  or T+bin to manually enter the bin instead of scanning it.  This is necessary in order to insure the system knows whether you are hand typing or scanning a bin.  We&amp;#039;ve also modified the printout of the bins to add a T and I respectfully to help in knowing this needs to be done. ( 45515 )

○ Added new option to the Pay Purchase orders menu that allows for only viewing suppliers that have currently due bills instead of giving a list of everything in the list that you owe money to.  To use, just selected the checkbox and the form will refresh with a new list of suppliers based on due dates. ( 45340 )

○ We have enhanced the kit building/unbuilding process to allow for auto unbuilds on specified kits.  First and explanation:

If you have kits like 6 packs of oil but you sell them as individual quantities, you can now follow these processes to have Lizzy automatically unbuild the kits and order the correct kits.

1) Lookup the Inventory item for the main Kit Assembly (The 6 Pack you order from your supplier).

2) Click the checkbox beside the &amp;quot;Order By Master&amp;quot; option.  This tells Lizzy that you wish to always order the kit, not the individual items.

3) Click the checkbox beside &amp;quot;Auto Unbuild On Receive&amp;quot; option.  This tells Lizzy that when you receive the main assembly number into stock it should unbuild them all into individual quantities.

What happens:  Now that you&amp;#039;ve selected these options, Lizzy will do the following:

1) If you sell a kit (the main assembly number) it will order that kit as you would expect.  It will also receive that kit into inventory as you&amp;#039;d expect, but it will not unbuild it.

2) If you sell an individual package of oil or perhaps you hit your min/max for that individual quantity, Lizzy will order the required individuals on a PO.  However, if you go look at the PO it will show you and the supplier that you need a case of oil, not an individual quantity.  The nice part about this is that if you have customers special ordering these individuals, Lizzy will keep up with who wants what so that everything works when the cases arrive.

3) When you view and order the PO, the system will show you the case quantity and cost.  It remain this way all the way up to the receive process.

4) During the receive process, Lizzy will begin showing the individual part number and quantities so that the person receiving the order knows how many individuals go to which people.  So as an example:  If you special ordered 2 individuals, Lizzy will show you that you ordered 1 case and will in fact order 1 case.  But when you hit receive, Lizzy will tell you that you have 6 individuals coming in and that 2 need to go to a customer.  It will then receive the other 4 into the individual item&amp;#039;s inventory.

We should have videos on this entire process in the next few days.  Check in the Parts Receiving Clerk&amp;#039;s position of the learning center. ( 45274 )

○ Added new icon to the PO that will open the Assembly information if you&amp;#039;re viewing an item that happens to be linked to a kit. ( 45274 )

○ Fixed problem with receipt box that was not allowing you to select the entry to push to checking account. ( 45268 )

○ Fixed problem with PO backorder process that was pulling the invoice date from the original PO and pushing it to the new backordered PO.  This was causing the receiving of the backordered PO to hit the GL for the same day as the original PO and in some cases was being prevented if that time period happened to have been in a closed out period. ( 45227 )

○ Fixed problem with payable and liability accounts not showing correctly on the new balance sheet. ( 45158 )

○ Fixed problem with the scan field not remaining in focus after printing a barcode label during receive process. ( 43558 )

◈ **Contacts**

○ Added new dealernumber field to the brands control to help keep track of dealers vendor number for reporting purposes. ( 45729 )

### ◈ Conversions

○ For dealers having their data converted from another business system, we&#039;ve added the ability to lookup converted units directly from the service section instead of having to pull in through contacts area.  To use you select the button to view the linked units, then click on the unit you wish to pull into Lizzy.  In the process verify that the model and other information is correct and save to add to the service ticket and to Lizzy. ( 45206 )

### ◈ Email

○ Added ability to create folders to link form emails to in order to help organize things better.  This grouping folder is also available on the email control to help find emails you&#039;re wanting to send to customers. ( 45507 )

### ◈ Interfaces

○ Added a new REST interface to Lizzy that supports dealing with cancelled items from the Lizzy iPhone App.  This enables the app to now provide a list of what is currently in the bin and then process it back into inventory with the hand held scanner containing an iPod or iPhone. ( 44880 )

### ◈ Inventory

○ Added ability to view the special order bin movement history from the item movement grid when viewing a special order item in the special order list as well as the inventory view screen.  When clicked it will show you every special order bin a customer has been assigned and when. ( 45550 )

○ Added new options to the Assembly items in inventory section so that you can now tell Lizzy whether you order the kit directly and whether you want to auto unbuild on receiving orders.  The new processes allow the system to automatically order the kit but receive the individual parts.  There will be videos in the next few days added to the Receiving Clerk section that will go through how all this works. ( 45272 )

○ Fixed problem related to doing location transfers. ( 43980 )

○ Fixed problem with barcodes not being printed during receiving process. ( 42849 )

### ◈ Invoicing

○ Fixed the select a Tax control so that you can not see tax rates that exist for other locations.  So if we have a dealership in Georgia and another in Tennessee, I should not be able to see the Tennessee taxes when I&#039;m at the Georgia location. ( 45872 )

○ Added ability for Lizzy to determine now whether or not to choose out of state tax or state tax based on where the customer is located and the type of invoice being created.  Also has ability to look at multiple locations for companies operating in multiple states and if there is a location in the state of the customer it will chose that locations default taxes for the customer instead of the default taxes for the shipping center.

As an example:  If you have offices in Kentucky, and Indiana and the customer is in Texas, then Lizzy will choose Out of State for the tax.  If the customer is in Kentucky and you ship from the warehouse in Indiana then it will choose Kentucky for the customer&#039;s taxes.  If the customer is in Indiana then it will chose Indiana.  Other invoice types will still choose the default taxes as before. ( 45871 )

○ Fixed problem with Kentucky tax not calculating correctly in the new tax code. ( 45814 )

○ Added work order deposits to the totals control so that if you&#039;ve collected a deposit on a service ticket it will be properly displayed at the bottom of that service ticket. ( 45306 )

○ Added ability to edit the contact address and zip information directly from the web orders section of Lizzy before the information is pushed to an invoice. ( 45275 )

○ Added new PPM flag that gets set on jobs that are switched to PPM.  It works similar to the warranty flag and in fact replaces the warranty flag when viewing jobs. ( 43982 )

○ Fixed problem with finance reserve calculations not being done correctly. ( 35597 )

○ Added new Service report that allows printing a color coded list of completed service tickets where customers need to be contacted.  List allows for viewing ticket inline as well as logging a call by simply clicking on the customers phone number.  All of the information needed is available from the report itself. ( 45082 )

### ◈ Payroll

○ Fixed Problem with the deductions for retirement not displaying properly on the deduction items.  Proper amount was being deducted, it was just displaying incorrectly. ( 45337 )

- Added new ADP Payroll export for time sheet data.  In the process of adding this we&amp;#039;ve also added new menu to the Payroll Setup in Settings for ADP Employee Setup where you can enter each employees ID for ADP and the system uses this data, along with location information to export the time sheets that can then be uploaded to their website to do payroll. ( 45006 )

- Resolved. The correct W2 form to use is Office Depot #873-677. ( 45999 )

◈ **Units**
- Fixed problem on the finance analysis report. ( 45536 )

- Added new report in Service list that allows you to print list of units that were purchased between the selected dates that have not been brought back in for service since the date of purchase.  Report allows for logging phone calls and reviewing original purchase invoice in line. ( 45060 )