

**Project : Lizzy**  
**Date Release : 01/23/2014**  
**Public Release Notes-Version 3.1.0.3 ( Final Release )**

◆ **Accounting**

- Fixed problem on receipt box in checking that was preventing you from pushing some receipts over to the checking account. ( 46391 )
- Added a new GL Adjustments menu to the view check control in the check register. This will allow you to do adjustments from one account to the other but they will tie to that check. This allows you to change a checks GL hits from one account to the other without having to void the checks first and recreate it. ( 45824 )
- Added guard rails to PO Receive process that forces you to select which PO&#039;s you want to receive against when receiving PO&#039;s. When using T-Bins:
  1. the &quot;Receive Items to Selected PO&#039;s Only&quot; checkbox will ALWAYS BE CHECKED and the use will be unable to uncheck it.
  2. Upon selecting a po to receive, we&#039;ll look to see if anyone else has that same po selected, and if so, error out.
  3. Once a PO is selected to be received we will only let you uncheck it if there are NO items scanned for that po yet.
  4. The green plus icon needs to disappear cuz with t-bins turned on you should always be using a scanner. ( 45654 )

◆ **Calendar**

- Fixed problem where activity panel was not viewing some call backs that were scheduled. ( 46342 )

◆ **Contacts**

- Added time zone to the contact advanced search control. ( 46168 )
- Linked new progress level link table to the home screen and other areas where the older controls use to be. ( 46047 )
- Fixed problem with scheduling call backs not saving properly. ( 45853 )
- Added ability to do advanced search based on customers at a particular progress level. ( 45511 )
- Added ability to track sales progress levels per phone topic and also added new tracking system so that we can see how long a customer sat at a particular level, who moved them and when. So we can now not only report who is at what levels today but we can historically look back and see how many leads we had come in, and how long it took to get them moved along in the process. Look for the new progress level drop list in the call topic itself instead of only seeing it when creating opportunities. ( 45508 )

◆ **Dashboard**

- Fixed problem with the color bars not properly displaying in the Chrome browser when working with sales progress levels. ( 45512 )

◆ **General**

- Fixed the from email address that gets used when automatic emails are sent out from using the main contacts email to using the company settings email address for service or sales, whichever applies. ( 46251 )

◆ **Interfaces**

- Added new interface to export orders from Lizzy and upload to World Of Powersports. ( 42375 )
- Added Triumph EDI interface that allows exporting orders from Lizzy to upload into their website. ( 42374 )

◆ **Inventory**

- Changed the assembly build process so that when building multiple assemblies we only hit the general ledger and history tables a single time with multiple quantities instead of hitting once per individual qty. Reduces the amount of information in the history tables and cleans things up a bit. ( 44014 )

◆ **Invoicing**

- Removed the automatic email process for completed service tickets and turned into an email button that can be clicked by the service department when they are ready to notify the customer. New system also keeps track of how many times you&#039;ve sent a notice and allows you to resend it. ( 46348 )
- Added shipping to the taxable list for Kentucky and Indiana. ( 46209 )
- Fixed problem with the special order tax processes not calculating the tax for battery taxes properly. This did not cause problem with taxes but rather that the initial deposit was not enough to cover all the taxes when the customer came back to pickup parts. ( 46157 )
- Increased the length of the gift card numbers so they can now handle numbers up to 50 in length. Some dealer gift cards had numbers long enough to chop off the last few digits. ( 46072 )
- Fixed problem where shop materials were not being auto calculated unless parts were on the ticket. ( 45718 )
- Added California to our new tax system and have started converting customers over to the new system. ( 45481 )

- Fixed problem with opening invoices from the special order screen where it was occasionally opening the wrong invoice. Also fixed problem with error message coming up on the first click of the icon. ( 43879 )
- Added signature capture to rental invoices. ( 43103 )
- Removed warranty from the invoice trouble shooting report. ( 35656 )
- Fixed. Invoice is cashed out. ( 37713 )

#### ◆ Payroll

- Fixed problem with the W-3 report printing employee personal phone number instead of the company phone number. Also removed the email address from printout since we would never know which to use. ( 46112 )
- Added business name and employer id to the top of page 2 of the Form 940 report. ( 45888 )

#### ◆ Settings

- Fixed problem with Lizzy not always saving model number cost values so that it could pull it up later when adding another unit of the same model number. ( 39230 )