

**Project : Lizzy**  
**Date Release : 02/04/2015**  
**Public Release Notes-Version 3.1.0.38 ( Final Release )**

■ **Accounting**

- Removed unreconcile button from the checking reconcile report to prevent people from clicking it and causing problems. ( 61956 )
- Fixed problem on the compare P&L control where totals were not matching. ( 61751 )
- Modified Asset page to have system automatically hit the GL when you depreciate items. Also added a scantag field to the control to allow putting tags on all assets to help with keeping track of them. ( 61488 )
- Removed refresh option from P&L and balance sheet reports so they always do a refresh as the option was causing too much confusion. ( 60715 )
- Revalidated report figures and processes on 20 Group reports to insure they were 100% operational. Manually verified numbers and checked everything out. ( 53975 )
- Added a date range to the Fees Report. ( 62434 )

■ **Inventory**

- Reworked the Item Image upload controls so they work cleaner and faster. ( 62596 )
- Fixed problem in create inventory categories control where if you were on page 2 and deleted an unused category it would pop you back to page one. Now it will remember the page you were on when you deleted the item and return you to that page. ( 61710 )
- Tweaked Sales and receivable report and relabeled a few things to make it more clear. Added location data to report as well and tweaked export to insure all data was included. ( 60318 )

■ **Invoicing**

- Added new Unit Document Tracking system that allows attaching things like extended service contracts, PPM and others that will stay attached and available on the unit itself. Added new icon to the service ticket on the unit that allows accessing these documents. See video 7.4 in Service Manager section. ( 62153 )
- Fixed problem on major unit deal where the unit list price was not auto filling on some units. ( 62103 )
- Added new features for extended warranty service ticket jobs. See videos 8.1 - 8.6 in the Service Manager section. ( 62096 )
- Reworked the Internal ticket portion of the service list to allow viewing based on job type and also made sure all of the other drop down and selection elements on the control work properly when viewing these types of tickets. Also have it showing the customer purchasing the unit on the control instead of the dealership name. ( 62016 )
- Added ability to view emails sent from an invoice in the view correspondence control. ( 60976 )
- Fixed inventory bin linking process so that you can only link a consignment bin to a customer record. ( 60973 )
- Added ability to customize service emails before sending them out. ( 59122 )
- Added new Parts Fetch system and have added a number of new vendors to the list. Also tweaked an ordering problem for one vendor and a few other minor issues. ( 53411 )
- We've added a new rejected from service option to jobs that are attached to units where the customer is unhappy and brings the unit back a second time for the same issue. We've also added a new video in the Service Manager section of the Train Me library for video 5.7 that documents its use. ( 60974 )

■ **Payroll**

- Fixed problem with entering manual deductions into payroll. ( 62711 )
- Added new methods for dealing the SUTA caps on the payroll. ( 62154 )
- Added the ability to set a time period of "Annual" to the tax liability report. ( 62037 )

■ **Sales**

- Added ability to process a consignment unit into inventory so that internal tickets can be processed during a deal. Earlier version did not allow this to be done because the unit did not become property of the dealership at any point to allow it. Now you can process early, do the internals and then sell it to new customer. See video: Sales Manager -> 3.3 ( 61698 )

## Units

- Fixed a problem on PO where unit costs were not showing the proper amount due to them being refinanced for higher amount than the original cost of the unit and the original invoice amount was what was showing on the new PO. We now have 2 fields to track cost to deal with situations like this. ( 62000 )
- We've changed the way you link serialized units to each other in the serialized section and also done a video to show you how to use the new features. One huge advancement is the ability now to link multiple serialized units to a single master unit and then sell them all together. See the video in the Sales Manager section labeled "2.9 Linking Units Together" for more details on how to use the new features. ( 62350 )