

Project : Lizzy
Date Release : 03/04/2014
Public Release Notes-Version 3.1.0.7 (Final Release)

◆ **Accounting**

- Added old COD Methods back into the processes so that you can do either method to hook to PO's. (47541)
- Added new Kubota Purchase Order Export. (47473)
- Fixed problem with printing purchase orders that had assemblies and the qty was printing as zero. (47326)
- Fixed problem with assembly items on purchase orders printing zero quantity for the order amounts. (47326)
- Added ability for Lizzy to remember what PO's you had selected for Payment so that if you leave and come back everything will still be selected and filled in. (46337)

◆ **Calendar**

- Fixed problem with calendar invitees disappearing on some events. (47683)

◆ **Contacts**

- Fixed problem where if you hung up a call with out filling out the contact you spoke with, in some cases it would not give you an error and would leave the call running. (48317)
- Added new sales person graph to the contact reports to show the following:

First Graph: List each sales person found between the ranges and show number of calls each one makes on a graph for each day/week...

Second Graph on same page: List each sales person between range and show duration of calls each one makes.

Third graph on same page: List each sales person between range and the number of emails each one sent. (46160)

◆ **Interfaces**

- Added new fields to the Inventory export to show alias and UPC numbers if the appropriate box is checked on the report to include the information. This information does not show on the printout, only in the CSV export. (43133)
- I spoke with Les today & he stated that he tried to export an order this morning but there was no export feature. (42375)

◆ **Inventory**

- Fixed a few problems with the size and color routines in the Lizzy webstore module. (47647)
- Added new menu in the Assembly section of Inventory that allows you to see the assemblies that have been special ordered by customers. From here you can order the necessary parts you need and build the kits you have enough parts to build.

When building an assembly we've also added code to automatically cancel any orders that were placed for the original assemblies and to tag all special orders to pull from instock instead of ordering.

For this to work properly, you will need to create a new manufacturer with a business name of "Assembly Vendor". Tag them as a manufacturer and supplier and in the supplier section check the box for them to be an inventory supplier. Lizzy will be creating purchase orders for this supplier during the process but you should never order or mess with the PO as it is only there as a holding tank for the assemblies until you get the necessary parts to build the necessary quantity. (47197)

- Modified the build and unbuild processes for Assemblies so that Lizzy more correctly handles them. Here is a detail of the changes:

1) When building an assembly you have to choose the bins you are going to be using when building and unbuilding the items because the process is too complicated to have questions being asked in the middle. The old code was not doing a good job of using the proper locations and the new code should deal with things much better.

2) You can no longer build an assembly across locations. If the original assembly was made up in location 1, then only location 1 will be able to build and unbuild the kits. A future release may have us adding the ability to setup the same assemblies in the multiple locations but the current version requires that you pick a location and stick to it. In most cases this will not be an issue.

3) When unbuilding we no longer ask you how many to unbuild. Because of the complex nature of working with assemblies, the system now displays a list of individual builds and you have to unbuild them one at a time. This shouldn't be much of an issue now that you can set oil and other similar assemblies to unbuild automatically. (45889)

◆ Invoicing

- Added new "Send To PO" checkbox to the unit types setup control in settings so that you can now control which units will be sent over to the purchase order. (47778)
- Fixed problem with some model number defaults not being pulled into new invoices when adding by model number. (47753)
- Fixed export process of daily sales record so that it matches columns of the visual report. (46465)
- Added new location drop list to the Sales by State for multi-location dealers. (46336)
- Added finance reserves to the recap and sales person performance reports for dealer. Currently individual process as not many dealers do this. (45487)
- Lizzy now creates a relationship between buyer and co-buyer on deal if one does not exist. The co-buyer info will now display on the view invoice next to the buyer info. (42670)
- Fixed. Made the necessary changes to Lizzy that prevents customer from charging Discretionary Tax on un-attached items on a Major Unit Sale. (47415)

◆ Payroll

- Added ability to assign employees to the ADP employee setup screen. (47434)
- Added 2014 941 form to payroll system. (45915)

◆ Service

- Added location drop lists to multiple reports for multi-location dealers. (46148)

◆ Settings

- Added new notice to the settings customers bins control that tells you the highest currently assigned bin number. (47989)
- Added new control to the webstore shipping methods control to handle the following scenarios and provide the ability for the Lizzy webstore to zero out shipping charges if the appropriate conditions are met.

Scenarios:

Generic is to apply to all customers no matter what and might be something like ordering over \$250 gets free shipping. So in the above table you'd have name Generic1, Generic would be checked and amount over would be 250

Another example of a generic would be a quantity and would basically be something like, if they order over 6 helmets they get free shipping. It would be similar to above except it would have qty filled in and it would also be accompanied by a categoryid which comes from itmCategoryA table.

Then you'd get to your customer specific entries that would not be tagged as Generic but might say:

Gold Level, Over \$200 Free shipping

Silver Level, over \$150 Free Shipping...

Obviously on these they would never apply unless the customer themselves have a link in the above mentioned link table and that will be setup by looking up the contact record and then clicking the drop list to link to a free ship program. The droplist will only show up if the dealer has free programs setup in settings.

Once this is done the webstore will determine if an order has shipping charges, then looks through generics to see if the current order fits a bill to get free shipment, and if not it will look to see if the customer is assigned to particular program and if so, if it applies. It will just work its way down the list until it either applies a free shipment and stops looking further, or it gets to the end of the list and finds nothing and charges the customer. (47902)

- Added payment method setup to the webstore setup controls for Lizzy Webstore. (47794)
- Changed the tax rate setup control to display the names based on the global state tax tables instead of what the user typed. (47477)

◆ Units

- Redesigned the Serialized Unit Image upload controls to work more inline with the way the item uploads work. Also integrated into the new Lizzy webstore. (47550)

◆ Webstore

- Added new features for colors, sizes, payments and other various features to the new Lizzy webstore. (46534)