

Project : Lizzy
Date Release : 04/27/2016
Public Release Notes-Version 3.1.1.1 (Final Release)

◆ **Accounting**

- Fixed issue with the last four of credit card numbers & the check number not appearing on cash drawer till report. (83857)
- Changed P&L to hide shrinkage for units when "hide shrinkage hits" is selected. (80919)
- Updated tables for CODIS interface (79074)
- Added business name to the Contact Name section on the Units Sold Not Paid report so units sold to a business will show properly. (82859)
- Fixed issue with refund invoices not showing up on Sales & Receivables report. (76135)
- Added the ability to export Supplier Purchase History report to CSV (81761)
- Fixed bug where Lizzy was not always charging the correct finance charge. (81739)
- Added ability to export to TISCO (81564)

◆ **Contacts**

- Added "Effective Date" field to major unit sales to keep track of insurance information (79507)
- Added the ability to search contact records by last modified date. This shows under the Advanced Search control. If a date is entered, Lizzy will show all contact records that were modified/updated on that date. (81947)

◆ **F&I Forms**

- Added MVR 330 and MVR 608 forms for NC (81151)

◆ **General**

- Document manager added to PO. You can upload files or images on the PO itself or to each line item on the PO. Security roles set under Accounting/Payables/View Last PO for allow user to upload and edit document manager. (83794)
- New icons added to top menu. 'Home' has been replaced with a home icon. The lizzy alert system has changed. No more triangle icon in top right corner and no more red rectangle for Lizzy Alert in bottom left. All alert notifications are in the main module header. Grey icon means no alerts. Yellow means you have alerts but they have been opened and looked at, red means new alerts and will also have a count indicator of how many new alerts you have.

The new alerts control breaks out the different alert types and now allows for clearing out only that alert type. You can also clear all alerts like before. (82728)

- Fixed 3" barcode labels where the price was getting chopped off and wrapping back around to the beginning of the bin. (83567)

◆ **Interfaces**

- VNext interface has been updated to use new REST call. The Invoice notes will now have transactionid,AVS Code and last 4 of CCN. (78701)
- Added Channel Advisor interface to Lizzy (56977)

◆ **Inventory**

- Added support for inventory adjust file upload. File type accepted is CSV (comma separated values). Fields accepted Item #, Qty, Cost, Bin Name, Brand Name.

After upload, those items not added to the adjustment list go into an exception report. You can view your exceptions or all. The buttons are located by the view adjustments buttons.

The exception report will list out each part that Lizzy could not find, could not match a bin for or the part was found on multiple vendors and you need to tell Lizzy which to use. From here you can set the vendor which tells us the part. At that point if we find a single bin we use it, else you must still supply a bin.

If Lizzy cannot find the part# at all, you will be able to locate the item in Lizzy that you meant to use. If the part does not exist yet, you must manually add it then locate it here.

We supply the reason it was not added as well as the line # of each item in your file. If a line item is ready to be processed, you will see a green check and that it is ready in the Exception column. (78559)

- Corrected issue where the Top Selling Items report was miscalculating information (81822)

- Corrected issue where words were overlapping on the inventory list report printout (82485)
- You can now move parent/child parts to another PO and Lizzy will place the correct part number on the PO for the corresponding supplier. (83608)
- Font size on 3" barcodes is back to normal. (83823)
- Added the ability to export dated inventory report to CSV (53609)
- Fixed issue with inventory master report (run for specific vendor) not showing cost or list price. (82085)
- Added new field in sales promos to limit a promo from being applied unless the contact and promo share the same matrix. So if this is set and the promo is set to a matrix like 'Gold' then only customers set to gold will ever have this promo available. (80352)
- Added the ability to look at non inventory items only on the Inventory List report (78493)

◆ Invoicing

- Corrected issue where fee report was showing duplicate tag fee entries for the same invoice (84671)
- When the price of a part is lower than that of list/MSRP, Lizzy will now display a yellow exclamation icon to the item grid on an invoice. This is designed to alert the dealer when the price of an item changes between a part being special ordered for a customer & the price of that item changing prior to delivery of the part to the customer. This way, the dealer can correct the customer's price & charge the additional amount if desired. (70517)
- Added the Refund This Invoice button to processed rentals. The odometer out and hours out are intentionally left to 0 to force employee to set them again. Also note that the refund does not go on the schedule, nor will it get an edit/schedule icon. These refunds are meant to refund the original IN FULL, so in cases of partial refunds, the employee will need to do a full refund and then redo the original rental. (83811)
- Added a column to the paid invoices report to show who cashed out the invoice. You can also select a specific sales person before generating the report. (84295)
- Added labor taxation to NC tax code (79179)
- Added ability to move items to another job. Added security for this under invoicing, general invoices, view current invoice - Allow user to move items from one job to another. (65179)
- If an item is marked as oversized, now displaying this info in red on the item on invoice view so any applicable shipping can be applied based on this knowledge. (82732)
- Added filters for store Location and Department to Sales Summary Report (76491)
- The Deferred Down Payments functionality is now available on F&I Product invoices (76115)
- Fixed issue with partial quantities causing tax calculation issues. (82016)
- Fixed bug related to official fees on unit sales. When changing a fee vendor on the unit sale, the changes were sometimes not saving & therefore not showing properly on the fee report. This has been corrected. (82838)
- Corrected issue with Sales Performance report - all employees were not showing up in list to select to see individually. Also changed so that if Show Detail is not selected, we are hiding the "+" sign. (81919)

◆ Payroll

- Updated 941 form (83556)

◆ Sales

- Adjusted AR sales tax code (83944)
- Sales Manager commission calculations no longer include any of the extra income fees like DOC, Notary, etc. (82487)

◆ Service

- Fixed issue with priority not being displayed in service list when you are viewing My Tickets. (83812)
- Added new column for Billable time average on Service Ticket Averages report. (69475)

◆ Settings

- Added code to apply the existing security roles for editing sales and support profiles in view contact. (83072)

- Fixed issue where unchecking "show company name" caused the info move up & overlap the logo. Also removed old code that showed ability to change logo positioning, as we automatically set this by default now. (82059)
- Existing security role for allow user to perform refunds now applied to adding a part to invoice at negative qty. If you do not have the ability to do refunds you cannot add a negative qty item to invoice or picklist. Also no negative dollar amounts allowed on price when adding a part to invoice or picklist. (82613)

◆ **Shipping**

- DHL now has ability to reprint labels (81829)

◆ **Units**

- Added a checkbox to the In Stock Units report to show unit bin if selected. (84206)
- Added County Fee to list of fees that are payable from the F&I Fees Report. (82841)