Project : Lizzy
Date Release : 12/29/2016
Public Release Notes-Version 3.1.1.22 (Final Release)

Accounting

- Fixed issue with display of Master Account Headers when running a P&L comparison report. (89130)

- *Fixed issue where Lizzy was not using date range filter when also searching by check amount. (96806)

- *Added additional detail to the Dated Payables report. After clicking on the account number, the supplier name is now a link which when clicked will show the individual POs and their balances that contribute to the supplier total. Unit POs have an extra column for the VIN number and will display each VIN and its balance that contributes to the PO total.

  For all of the credit accounts, the supplier name is now a link which when clicked will show the credit memo number, the PO number that the memo originated from (if the memo originated from a PO--otherwise it will show "N/A"), and the credit memo balance that contributes to the supplier total. (97004)

- *There is now a checkbox to merge Equity account. When the checkbox is clicked, it will show a droplist on the screen where the account to be merged can be selected. Then the balance on that account for the date range is merged into Prior Profit/Loss. (96282)

- When using filters on the check register, the CSV export will now show only the filtered data that is shown on the screen in Lizzy. (38909)

Chat

- *Removed chat icon from contact locate grid and view contact screen since chat is not currently available. (91383)

Contacts

- Added texting capabilities back to Lizzy, with enhanced options.

  Carrier Set up in Settings -> General -> Set Up Carriers allows you to enter / modify mobile carriers and their SMS and MMS addresses they accept for texting.

  Added Mobile Carrier Drop List to Additional Contact Set Up that appears when you select a phone type set to a mobile category type. Once a carrier is set, you can text that number.

  Icon added to Additional Contact View, View Invoice Customer Info, and Sales Dept Received Interested Units report that allows you to text the customer if applicable. This icon will pull up a texting interface if only 1 cell # on the contact is set to a carrier. If there is more than one, then another list will come up first asking which number you want to text before proceeding. (93737)

- Many CRM enhancements

  1. Redesign of view contact screen to a tabbed layout and more grouped and streamlined interface. Adjusted font sizes and moved data to accommodate a less scrolling experience.

  2. Dashboard : Sales Manager has been completely rewritten. Previously, it would list out all salesman and calls that are not called back, opportunities, scheduled into the future etc. It makes the list long and not very useful if you have a more than just a couple of salesmen. We eliminated all this and now list out each salesman and their overall stats (how many at what progress level).

  - How many past due calls (with a number)
  - How many calls for today
  - how many after today
  - how many open opportunities per progress level (2 at quote level, 3 at come back, 1 will close) etc.

  In all of these above mentioned stats, the number will be something you click on to expand and see additional details about that stat. SO instead of displaying all past due calls mixed in with calls for a week from now and opportunities, if you click on how many calls for today, it will only show you the calls scheduled for today and so on.

  3. Interested units has been completely rewritten. Previously you could add interested units/models on a contact. This was a generic link that did not offer much use beyond seeing a list. Now, when a customer calls or comes into the dealership, you log a call or face to face and as you add interested units or models, it is linked to the specific topic/correspondence. This tells us more info now such as who the sales person is, when were they interested and what was the sales progress level at that time, how long have they been interested, and notes on the topic as well as notes on the interested unit. Now salespeople can see who is working on specific models/units with a customer without having to dig into call logs and asking around as the old way just generically linked a unit to the customer.

  - interested model control have been changed in the following ways:
  1. Now when you type in a model # there is a hot search for the actual model# as to prevent typos. Since the customer could be interested in models not yet in Lizzy, if the hot search is not found, you can quickly add the model into Lizzy from this screen. The hot search for model # applies to interested model form as well as possible trade-ins.

  2. Notify Me check box tells Lizzy that you want to be alerted when a unit comes in that matches the model # you entered through a PO receive or trade-in on deal. If you require Year or Make to match by checking those boxes, then you will only be alerted if that specific year of model matches etc.

  3. Removed grid of interested models and possible trade-ins and now have a more graphical design with photo of the model being displayed (if added to DB) with info, action icons as ability to add/view notes quickly.

  4. If no interested units or trade-ins are set for the topic yet, the form will appear by default. However, if something does exist, we hide the form by default and only display the models and trade-ins with a link to expand the form to add. Alternatively clicking to edit a model or trade-in will also display the form.

  5. New report added to view received interested units in Sales Dept - > Units - > Received Interested Units that displays everything that has been received for the selected date range that matches something one of YOUR customers are interested in. (The display only shows prospective customers for that specific salesperson.) It only includes active units in inventory. You can see all the units and how many customers are interested in each one. Clicking on the customer count will pull up another control to see all customers and their notes, interests and action icons to call, text, view contact etc. The alert that goes out from the Notify Me process takes you to this report for today's date by default to see what just came in.

  4. Additional enhancements in the form of layout, design and reports are coming soon. (92466)

- Interested unit search now only looks for interested units tied to an active topic for customers under the viewing employee. You will only see your customers. Additional info added to grid as well as view contact, log call and texting action icons where applicable. (91015)

- Fixed issue where account numbers entered in the supplier contact area were not saving (96492)

F&I Forms

- *Updated Colorado Retail Installment Contract form (92996)

- *Added TX MVD10003 (97575)

- *Added People's Bank Insurance Notice Form (97375)

- Added PA Authorization for Release of Motor Vehicle/Driver Record Information form. Also updated PA form MV-27 (Dealer Assignment Covering A vehicle Acquired and Held for Resale). (80060)

Finance

- Export added to Finance Analysis Report (95119)

General

- Added "Use Lizzy to Process this Card" checkbox for EMV processing. Box will be checked by default if dealer has credit card processing set up through Lizzy. The box can be unchecked to close the invoice out without processing the card through Lizzy. The box basically works the exact same way it did under the old credit card processing (prior to EMV being added). (96757)

Parts

- *Update to Allocated Inventory List (Reports -> Parts Inventory -> Allocated Inventory List):

  - Added Location support for Multi Location DB
  - Added CSV export
  - Added Available field - (current Qty available)
  - Added Summed (*true cost) amt. for all Qty available per location
  - Added Allocated per location
  - Added total amt. per location Qty Available + Allocated = total cost (true cost) per location (85299)

Payroll

- Updated sick leave & vacation time calculations in Lizzy to be more accurate when printing available time to use on pay stubs. (89807)

Rental

- *Added ability to add Damage Waiver to rental units. You can set the Damage Waiver percentage by going to Settings -> Serialized -> Unit Types. You have the ability to set a different Damage Waiver percentage for each unit type. (95534)

Serialized

- *Corrected issues with floorplanned inventory report. Report was not showing balances due. (97033)

- *Fixed issues with Unit Aging Report (95596)

- Added Model Description to Unit Aging Report PDF
  Also added a CSV Export option (95947)

Service

- Added start time and order by start time to service list when viewing My Tickets. (89755)

Taxes

- Added Excise Tax Support for Oil. Here is what needs to be setup to get the new Oil/Lubricants Excise tax to be applied:
  1) Add the tax to the part as an Excise Tax
  2) Edit the part
  3) Set the Measurement Type (we currently have Gallon, Quart, and Ounce available)
  4) Set the Measurement Qty: IE: Items that come in 1 gallon would be set to 1, 1 quart = 1, 16 ounces = 16. So when selling they would be selling a Qty of 1 16 ounce bottle of oil/lubricant.

  Knowing this info, Lizzy calculates the proper amount of Excise tax for the item. (96897)