Project : Lizzy
Date Release : 02/08/2017
Public Release Notes-Version 3.1.1.25 (Final Release)

Accounting

- Added ability to create multiple custom templates on the Profit & Loss report that will allow you to replace the account numbers and names of the accounts you attach to the template. This does not change your GL in any way; it simply changes the way those accounts look on the P&L when you run a report for that custom template. This is designed to be used for manufacturers who require specific account setup, so that you can keep your GL structured the way you prefer, but provide the OEM with the reporting they require. (97979)

- The cashdrawer report has been updated to show invoice and customer information if the transaction came from AR.

  There is now a column for ARID to display if there is one. (Note: ARID's can be from either invoices or PO's. Therefore, the Invoice column has been changed to Invoice/PO and it will properly display an invoice # or PO # depending on which it is.) (99014)

- If a Social Security number is present in a contact record (under the Additional Contacts section) & the contact also gets a 1099, Lizzy will populate the Federal ID number with the Social Security number on the contact's 1099 report. (99474)

- Added an option (sole proprietor) checkbox to the 1099 screen, that if checkmarked, prints the customer's first and last name. If the sole proprietor checkbox is *not& marked, it will print the business name as usual. (99468)

- Removed 1099 Copy A as it has to print on official form due to IRS requirements. It will print properly on a pre-printed form. (99447)

- Fixed issue with Accounts Receivable Aging Report when using print to PDF option. (98739)

- Fixed issue where VIN was not showing up under service details on 20 group report. Also added Warranty Claim Number to the report. (96822)

- In the 1099 report, each listed supplier is now a hyperlink which will show all of the 1099 checks that make up the supplier total when clicked. (98735)

Contacts

- New security permission added to Invoicing/General Invoice for Do NOT allow user to edit sales person on invoice. (99684)

- Fixed bug where topic/opportunity showed up more than once on view contact control. (99727)

- Fixed bug where Phone/Email controls overlap when editing a contact record. (98298)

Finance

- Lizzy now handles the Chrysler Capital Lease computations and document generation. In order for them to work, the appropriate settings need set for the contact in Finance Supplier section. (92927)

- Fixed issue with finance menu not saving options from Settings -> Finance -> Menu Sell Setup. (98086)

Invoicing

- *Corrected the Sales by State report to calculate the same totals as the Sales Summary report. Also corrected issues with the CSV export of the Sales by State report. (97738)

- Added a check box to view only dropshipped invoices on the shipping report (94068)

- Added a drop down box to select location on the 20 Group report (99068)

Parts

- Fixed minor issues with parts inventory adjustment using CSV file upload. This should resolve any problems with having to link brand name to part even if the brand name was included in the CSV file. If you still notice issues, please check to ensure that the brand name listed in your file exactly matches the brand name for that supplier in Lizzy. (96948)

Payroll

- Update to Employee Payroll Details Report:

  1) The Employee Payroll Details report now has a text field to process by year and the YTD tax information will print accordingly.

  2) Company details have been removed from the report as many dealers use this for employees, who do not need to see this information.

  3) Now, if Employee SUTA deduction is checked, it will show SUTA - Employee if there is any to show. (98942)

- W2 update: Added second deduction for box 12 on print out. (100239)

- W2 changes: Added checkboxes to settings to account for HSA and Retirement that will show on W2. (99396)
- Fixed issue with blank pages appearing in front of W2 report when generating W2s. (99530)
- Update 940 schedule A for Connecticut for 2016. State previously had a .21% extra rate that is no longer applicable. (100083)
- Added a checkbox to Settings -> Payroll -> Company -> Step 5 that will allow you to select if it is a retirement deduction for W2 purposes. Selecting this will put it in the section 12 area on the W2. (99847)
- Please note: in order to use the REVIEW DEPOSITS button on the 941 form, you must use the Payroll Tax Liability report. The reason is that tax liability gets tagged as a 941 payment from the report in checking and the Review Deposits button will pull all payments in that date range that have that tag. (This is not a change in the way the report runs, just a training note.) (99596)
- Updated Colorado payroll tax tables for 2017. (99465)
- Fixed issue with payroll summary report not running for a single employee. Please note: if you wish to run for a single employee, you will now need to select that option before running the report. (98646)

Rental

- Fixed bug where daily rental view showed incorrect start time for some rentals. (99116)

Serialized

- Corrected issue where paid units in inventory were not showing on the Aged Inventory List report (96754)
- Updates to the following reports:

  Supplier Receivables
  -Added column for Business Name
  -Added column for Customer Name
  -Added column for Date Created
  -Now able to be exported to CSV
  -Fixed bug where warranty claim # was not showing up

  Warranty Registration Report
  -Added field for Bid Assist
  -Added field for Fleet Price
  -Added unit paid field which shows a red X for unpaid units and a green check for paid units

  Sold Unit Log
  -Added field for Bid Assist
  -Added field for Fleet Price
  -Added unit paid field which shows a red X for unpaid units and a green check for paid units

  Unit Sales History - By Brand
  -Added column for Salesman 2
  -Added column for Bid Assist
  -Added column for Fleet Price
  -Export to CSV has been updated to include all the correct information, including margin & margin % (97309)
- Fixed minor discrepancy with the customer invoice amounts not matching the amounts on customer purchase history report. (98449)
- Fixed issues with unit sale by brand report not matching the P&L report. (99325)

Service

- Added checkbox option to service ticket detail report to show internals if desired. If box is not checked, the report will only show service invoices & no internals. (99793)

Settings

- 3 new form email types added:

  -Email Quote to Customer
  -Email AR invoice to customer
  -Email receipt of AR payment to customer

  If viewing a parts/unit quote, the email link will read Email Quote. It will use the quote form email if one exists, otherwise fall back and use the generic email invoice to customer form email if it exists.

If viewing an invoice that has been sent to A/R, same as above but link will read Email A/R Invoice.

When making a payment to A/R, there is a new link for email A/R receipt to customer. This will again, like above, look for that form email type and use it otherwise fall back to generic form email.

Print icons added to A/R details in far right column to allow you to email/print these receipts at a later date. The icons will take you to the post payment screen where the email/print links reside. (83197)

- **Shipping**
  - *Added ability to void/cancel a shipping label generated from Lizzy (98169)

- **Taxes**
  - Added sales tax for Windsor, CO. (100096)