

Project : Lizzy
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Public Release Notes-Version 3.1.1.26 (Final Release)

◆ **Accounting**

- Added printed date to each page in Balance Sheet. Also fixed formatting issues in the printed report; the columns line up better now. (100687)
- Corrected issues with income statement when running comparison. (99218)

◆ **Contacts**

- - Fixed bug when saving additional contact that would also set all fields to mirror its settings on the merged additional contact records under it.
- Fixed drag & drop additional contact merge process to be more user friendly. Providing a more clear representation of where you are about to drop the record you are dragging.
- Added ability to change/set the primary phone record on the PRIMARY additional contact record. Selecting a radio option by the phone # you want as main in the edit window will assign that phone as the primary phone the primary contact record. (100533)
- Corrected minor issues with texting in Lizzy. Currently, the texting interface is for outgoing texts only. You have to assign a phone to a phone type that has been set to the category of mobile before the carrier list shows up. Once this exists, you can click the icon by the phone for texting.

You should only see your texts to the customer. If you text from the received interested units control, it will only show you texts linked to that topic/opportunity. Texts sent from elsewhere in Lizzy will be ignored, only relevant texts for that opportunity will be displayed. (99954)

◆ **F&I Forms**

- Added Yamaha Waverunner Dealer Setup and PreDelivery Checklist. (98639)
- Updated Polaris protection plan form (99167)

◆ **Invoicing**

- Note: for customers using EMV processing through Open Edge, please be aware that per Open Edge, they do not send back a receipt on manually keyed transactions. This is not something we can change in Lizzy. For manually keyed transactions, you will need to print a regular 3 inch receipt or full sized invoice. (99753)
- There is now an option to change/edit the shipping method on internet orders that have not yet shipped. You can also enter the amount for the new shipping method so that Lizzy can calculate what the customer owes for the change. The employee who changed the shipping method and the date of the change will be noted in the invoice for reference.
 1. The new change/edit option can be accessed by clicking the icon of a shipping box, with a pencil, from the totals control when viewing the invoice.
 2. This icon will only show on the original processed Internet Invoice, and only if all items from the order have not yet been shipped.
 3. Clicking the icon will bring up a popup that has the shipping charge and method in it. If you change either, the invoice will be updated, totals changed, and notes added. NOTE: the amount paid won't change, nor will the subtotal, just the total. The notes will help with any confusion.
 4. If you have INCREASED the shipping charge, the customer deposit payment form will appear after clicking save, and it will already be setup to be a "specific invoice credit" that will tie back to this invoice. When you click a payment method, the amount you increased the shipping by will auto fill in. NOTE: this amount will be held into memory until you process the payment, so if you click a 2nd payment method, it will auto fill with the same amt again, so keep that in mind if doing multiple payment methods.
 5. Once all parts are shipped, you'll now have multiple credits on the payment form that will auto select to apply to the shipping invoice. (101245)
- *There is now a pencil beside "Price of All Units" on the major unit sale invoice. Clicking the pencil will give you the option to apply a percentage discount to the units you select. If discount is applied, you will see the change reflected in the Price of All Units field. (89996)

◆ Parts

- On the Sales Performance Report
 - 1) The parts added to units will now properly show up on the report and will be listed under the salesman that added them.
 - 2) The units will now only be listed under the salesman who put them on the invoice. (90243)
- Fixed issue with Inventory List report (parts inventory) not running when true cost selected. (98270)
- Corrected issues with Item Sales History report:
 - 1) Incorrect quantities showing in stock when run in a multi-location database, but only selecting an individual location on the report.
 - 2) Also fixed a bug that was making the Sold Qty column all 0's when the All locations option was selected. (99357)

◆ Payroll

- Added the ability to set the "work week starts" for each individual employee. There is now a checkbox in Settings -> Payroll -> Company screen that will allow you to turn on/off the option to calculate based on when the work week starts. This change was added per customers' requests as some dealerships are open 7 days a week and they rotate the employee schedules. This comes into play when calculating overtime. (100384)
- Added Quarterly Tax Information report that will provide an overview of the company taxes and a breakdown of unemployment/SSMD by quarter. Report can also be run for a single employee. (83906)

◆ Serialized

- Fixed issue with units showing up multiple times on the Units With Accessories Report. Also updated report to add a column that shows the quantity of each item on the invoice job. You can see now which items were added (positive quantity) and which were removed (negative quantity). (97966)
- Fixed issue with recap screen not showing costs for accessories on major unit invoice. (96608)

◆ Taxes

- Added enhanced sales tax calculations for major unit quotes for Alabama dealers. In the state of AL, powersaws and generators can be sold for 3 different uses: Personal, Farm, Mfg. Machine (Construction). A Vehicle Use droplist has been added to the Edit Unit control to mark how the unit will be used. The unit types must be also marked as Power Equipment in Settings -> Serialized -> Unit Types. That, combined with the USE setting, is what determines which tax to apply. The Vehicle Use droplist now also displays (when editing a unit) on a Major Unit Quote for units that are NOT in stock. (98950)
- The Idaho Waste Tire Disposal Fee has been implemented (100863)