Print

Project : Lizzy
Version : 2.1.1.6 (Final Release)
Date Release : 06/30/2009

Release Notes (Version 2.1.1.6)

- Accounting
  - Added ability to reset the PO Locate form. (281)
  - Added new Balance Statement report to the Accounting section. (249)
  - Added new Profit and Loss report to Accounting Reports section. (247)
  - Added new PO View / Print control. (223)
  - Added ability to Order a purchase order now. (221)
  - Added new Undeposited funds module that can be viewed from Account / Deposits. This shows a list of payment items that have been collected throughout the day and allows user to deposit them into the checking out. EFT's are also handled from this screen and will build up an interface file that can be transferred to the bank for easy processing. (191)
- Calendar
  - Fixed problem with Daily Calendar popup being positioned too far towards bottom of the page. (288)
  - Added new Delete button to the quickview popup for calendar events that allows user to quickly remove items from their calendar.

    Fixed problems with Calendar quickview where it opened off the screen.

    Added scrollable region to the note section to display longer notes and still stay on the screen.

    Repositioned calendar to use more of the width of the browser. (213)
- CRM
  - Added ability for Lizzy™ to remove scheduled call backs in the event a user clicks to resolve a related issue manually from the view correspondence page. (311)
  - Fixed Sales Pipeline report so that it does not include inactive customers. (306)
  - Fixed problem with the Office Hours view control not correcting for Timezone information. (298)
  - Added ability to run the HMC report for only the selected customer. This allows you to review total ticket and call times spent on that single customer. (274)
  - Added ability to store city and states without having a zipcode to allow handling countries like colombia that don't use zipcodes. (18)
  - Added new summation to the HMC report that shows amount of time logged to tickets related to the specific customers. (275)
  - Added new drop down list for Drivers that will be used within the Petrol processes. The list will show on the PO and allow the company to list which driver picked up the load and will also be used on invoices to help link specific PO's to the specific invoice in which it was delivered. (273)
  - Added new Advanced search link to the locate contact control and fixed the default form so that it no longer shows all the detailed search fields which take up a lot of screen space and don't get used all that often. Lizzy will remember whether you opened or closed it and will reopen in the same state last used. (211)
  - Added new report to display customer sales history. (239)
  - Added new Stop Call link to the inprocess report that only managers can see but that will allow them to

stop a call for other reps that might have left one open. (214)

- Added ability from the View Correspondence page that allows you to enter a reply email and have it linked to the original email instead of having to create an entirely new entry. This process also removes email to/from fields and allows you to simply enter the reply and log it. (195)

- Dashboard
  - Added a new Stop link to the Inprocess report that allows people with the privilege turned on to stop a users time being logged to a ticket. This is meant for moments when someone walks out of the office and forgets to stop their time and needs a manager to stop it for them. (210)
- General
  - Created new Template 2 that can be selected for a different look. All functionality is identical in both templates. (293)
  - Added ability for customer websites to interface to their specific database in Lizzy to have contact information sent through and inserted into their internal databases automatically. Nizex.com already uses these features and for those interested there is a file named sitecode.html on nizex.com that has all of the information needed. See KB item for more information on how to use the sitecode.html code on your specific site. (287)
  - Added ability for the user to enter only their email address and click a button saying they have already contacted us once and it will allow them to skip filling out all of the other fields on the data collection screen that gets plugged into other sites. (286)
  - Added new user data collection process that can be plugged into any website and pointed back to Lizzy for data collection purposes. The controls will take user data such as name, address, phone and send to Lizzy to have her add it to the appropriate companies database. There is a Knowledge Base Item on the subject that lists where the file is and how to use it. (285)
- Inventory
  - Added New Tax Qty field to the Inventory items list. This checkbox tells Lizzy that when she sells this specific item to tax its qty times a flat rate tax instead of taxing its extended amount. This is specifically for taxation related to gasoline and oil handled by Petrol distributors. (270)
  - Added Qty field to allow adding inventory quantity during the "Add New Item" process. This way you don't have to go to adjust inventory afterwards. (262)
  - Added ability to specify specific taxes that should be used when selling an particular item in invoicing. Lookup an item, click edit and select the taxes you wish to use for that item. (260)
  - Added new Active field to the Item list that allows you to remove an item from search lists and reports but leaving it in the list in case you later decide to reactivate it. (246)
  - Fixed problem where adding new Items wasn't defaulting the sales, expense and inventory accounts to the last entered item settings. (245)
  - Added new control to show Item movement on the View Item screen. This control shows how many items are On Order, Allocated and so on. (237)
  - Added Bin Location information to the View Inventory Item page in Inventory section. (233)
- Invoicing
  - Added new tax selection boxes to totals page of invoice to allow choosing tax rates for customers. (263)
  - Added new report to invoicing section that prints sales summary information. Choose a date range and how you wish for the report to be broken down and press locate to see it. Clicking on the groups will show the actual invoices that make up each section and clicking on the invoices will take you to the actual invoice in question to review it. (257)
  - Added Bin Locations and Qty's to the invoice items list so that once you type a number it will display your stock quantities. (236)
  - Added payment detail to the invoice view/print control to show exactly what types of payments and their

amounts that were used to pay on the invoice. (232)

  - Modified Contact Information control on invoice so that it only gets called once instead of recalling it on every page of the invoice. (240)
  - Added new locate invoice control that helps to locate existing invoices in the system. (227)
  - Added new View Invoice control that allows user to see existing invoices and then edit them if needed and if allowed. (228)

- Payroll
  - Added ability to enter and modify Holiday records that will then show on both the users time sheets as well as the calendars. (291)
- PDM
  - Removed the "Save and Start Time" button at the bottom of the PDM ticket form, unless you are the person assigned to the ticket. (276)
  - Added new print function to the Gantt chart view page to allow printing of the page. (219)
  - Fixed problem with Rejected tickets not properly showing on the Gantt chart. (215)
- Settings
  - Added new Company Default template setting in the Company Settings section that allows a company manager to denote which template he/she would like for all new users to start using. (296)
  - Added menu item in Settings Security to allow you to limit a users access so that they can only login from specific IP addresses. Nothing in the list for a user means they can login from anywhere at all. You can also have more than one IP per user if you need. (295)
  - Fixed problem with Department setup controls so they are more consistent. (303)
  - Fixed problem with Role Name modification not saving in Settings Security section. (302)
  - Added new Sales Tax setup form found in Settings / General / Tax Setup. This is where all tax related information is setup and stored. (243)

Modules effected by this release :

Module	**Version**

Current Versions of all Modules related to project :

Module	**Version**	**Date**