Print

Project : Lizzy
Version : 2.1.1.10 (Final Release)
Date Release : 04-04-2010

Release Notes (Version 2.1.1.10)

- Accounting
  - When writing a check in checking module, you now have the ability to link the check to the current contact. So if you want to write a check to AT&T, look them up first and then click the link and it will fill in and link the records together automatically. (1087)

  - When opening a check view in checking register, we have added a new edit button beside the check number that will allow you to change a check number on the fly if needed. (1086)

  - Added ability to transfer funds between different checking accounts. (896)

  - Changed PO report to pdf printout so that it can more easily be emailed or faxed. (870)

  - Added paginating to the PO Locate control. (887)

  - Made the Add Items control on the PO more streamlined and cleaned up the page so it displays more easily on smaller monitors. (890)

  - Added more options to the print billing statements report control. (1016)

  - Fixed problem in the Spring order function where it wasn't properly splitting orders from min/max quantities. (979)

- CRM
  - Added ability to add and change additional contact information directly from the contact view page instead of having to edit the contact record first. For some of the advanced information you may still have to edit but the general processes are now available from view. (1078)

  - Added ability to see conference calls that you are involved with even if you are not the person that scheduled it. You can also be the one that actually logs the conference call if the primary person is unable to. (986)

  - Added ability to assign price matrix levels directly to each customer on the view contact control. These settings are then used when creating prices on the invoice. (969)

- General
  - Fixed problem in IE7 where the top menus would staircase across the page. (892)

  - Added disclaimers to settings for invoices and then display the disclaimer on the appropriate invoice printout. (1059)

- Inventory
  - Added ability to export a price file from Lizzy to send to another company or a web store system. (1074)

  - Added XML interface that allows an external system such as a web store make requests directly into a dealerships data and retrieve inventory and price information on items in real time manor. (857)

- Added New Processing Menu to Inventory section to allow you to open the Pull Items processes directly from the inventory module even if you have not purchased Shipping module.   (855)

- Added new menu to Inventory Management for Returns bins in order to return items back to inventory when customers return them.   (855)

- Added new guard rail to the inventory section that prevents a user from changing an item from inventory to non inventory if it has ever been sold through Lizzy.   (553)

- Added Invoice Type to the Item Movement details that opens up when you click the quantities for each of the locations. Displayed on Invoice items page as well as inventory view control.   (884)

- Added additional selection methods to the Inventory Report as well as view options on the report itself.   (998)

- Added ability to change the bin location of an item to the item view control.   (1068)

- Added ability to run inventory report based on supplier.   (1065)

- Added manufacturer name to the located items list in Inventory section.   (1069)

- Added ability to locate items based on whether they are in stock or not to the Item Locate control.   (1067)

- Added ability to run min/max report based on supplier.   (1066)

- Added Sales note to the invoice add part control that shows sales specific notes at the point of sale.   (974)

- Added new report that allows you to select a manufacturer and then see a list of items that are below minimum. From the report you can also select items and have the system create purchase orders automatically.   (897)

- Invoicing
  - Added new labor sales report.   (1079)

  - Added new Mechanic Performance report.   (1063)

  - Added new Average Service RO report to Invoicing Reports section that displays the average amounts per RO and per Job.   (1056)

  - Added ability to check part prices and inventory levels.   (919)

  - Added new controls to Service Ticket jobs to enable you marking a job as needing approval. When unchecking the box you will be asked to enter the persons name that approved it   (939)

  - Added new link to the invoice view page that will allow you to email a copy to the customer if you have their email address.   (940)

  - Added more advanced pickup and delivery functions to the service ticket job screens.   (915)

  - Added new Pickup and Delivery report.   (916)

  - Added the Unit and Job information to the invoice printout. This new enhanced report keeps

all job related information grouped together with sub totals below each.　(876)

- ○ Enhanced the canceling of special orders to enable better tracking of cancellations throughout the system.　(878)

- ○ Added void function to the header on the invoice that will allow voiding at any time.　(1015)

- Payroll
  - ○ Added new Payroll company detail report.　(924)

- Settings
  - ○ Added new control in settings inventory to link the standard prefix list together with differences needed for things like Partsmart and other such applications.　(1082)
  - ○ Added ability to setup email retrieval information to the users profile in settings.　(965)
  - ○ Added ability to setup specific "How Used" elements for units to be used on Warranties and setting up units in inventory.　(949)
  - ○ Added new control to allow you to setup specific warranty claim types for each manufacturer.　(947)
  - ○ Enhanced Schedule Incoming service controls.　(938)
  - ○ Added new warranty returns code setup controls to settings.　(950)
  - ○ Added new Warranty Defect codes control to the settings section.　(948)
  - ○ Added pickup delivery setup controls in settings.　(914)

- Warranty
  - ○ Added ability to locate warranty claims by a number of different parameters.　(1055)
  - ○ Added Warranty setup per manufacturer in settings section.　(954)
  - ○ Added Warranty claim controls and processes.　(1062)
  - ○ Added Warranty setup to settings module.　(1048)

Modules effected by this release :

Module　　　　**Version**

Current Versions of all Modules related to project :

Module　　　　**Version**　　　　**Date**