Print

Project : Lizzy
Version : 2.1.1.11 (Beta Release)
Date Release : 04-08-2010

Release Notes (Version 2.1.1.11)

- Accounting
  - Reworked the Chart of Accounts control so that its easier to deal with. The control now shows only Summary accounts or accounts not assigned to a summary account and then allows you to drill into them to get to the related accounts. This should speed up the control drastically and make it easier to work with.   (1088)

  - Modified the Chart of Accounts printout so it takes up less paper and is more uniform.   (942)

  - This describes the current procedure for dealing with Bulk Items in Lizzy.

    1) You will generally have 2 part numbers: 1 for the bulk items that you order from the vendor and another that you'll use for selling individual quantities of those products.

    2) On the bulk item we are going to set it as a kit on the main inventory edit control. This enables us to add the individual quantity to it in the next step.

    3) Go to the Kit section in inventory and search for the bulk part number. On the next page specify the individual qty number you setup in step 1 above.

    4) Enter the qty of items in each case. This will be used later in order to sell individual quantities.

    After completing this step we have no actually done anything. We've only setup the ability to sell these items later on if we want. Now if someone wants to buy a case you'll sell them the case p/n. However, if they want individuals then we're going to need to open a case and put the individuals into stock. To do this we're going to do the reverse of what we'd normally do when dealing with kits.

    Instead of building kits we're going to unbuild one. So in the next step select the Unbuild menu and locate the kit in question. The case p/n is what we're after.

    Next enter the number of cases you're going to open. When you select the Unbuild kit button, Lizzy will take the quantity of items in each case, put them into the individual part numbers quantity and then remove 1 case from inventory for the full cases. Now you can sell individuals.

    A few notes are in order with respect to ordering these items. Obviously when you run out of items to sell as individuals you do not want to try to order them. You will need to manually remove the item from the PO and replace it with the bulk part number. We will eventually have this be automatic as well but for now this is the flow.

    Then when you receive the box of oil, it will go into inventory as a case. When you open the case to break it apart you'll go unbuild it in the kit section of inventory and Lizzy will handle the rest for you.   (982)

- Inventory
  - Added new report in inventory section called "Top Selling Items" that allows you to enter how many of the top selling items you'd like to see, from what date you'd like to look and then how many you'd like to see on the page at a time. Clicking generate will then show the items.   (1093)

  - Added new report called Items Sold 24 Mo History that will show 24 months of history for whatever you've selected to view. You can print all inventory items or select only a certain supplier or vendor. The report will then display a column for each of the previous 24 months.   (1081)

- Added the ability to tag a price matrix that you've setup and then apply that tagged matrix to other vendors. The system will then duplicate it for whatever you've selected when you click the apply tagged matrix link at the top.   (1060)

- We've added a new report to Lizzy under Inventory Reports called Allocated Inventory. This will open a list of items that are currently allocated on some invoice in the system at the time the report is run.   (1000)

- When editing an Inventory item you have the ability to add suppliers that you purchase the item from. You can add as many different suppliers as you like. We have added an icon beside each supplier that has been selected that when clicked will allow you to enter a vendor specific part number to be used for that supplier if its different than the number you're using.

  When entered, Lizzy will automatically use this number on purchase orders to that supplier and will switch it back to your number once its received. So the PO's match the vendor but your inventory stays the way you want it.   (1090)

- Added ability to mass update item costs based on a number of different parameters. You can update costs based on a standard or customer category, a part number range, a cost range or any combination of these items. Lizzy will remember all of the different parameters you setup along with the cost multiplier you set when you did it. These items can then be applied later on.

  The use of this feature is to allow you to import a price file that might have standard costs on it and then apply a Gold level cost reduction to certain items based on your being a gold dealer.

  To see the control click on Inventory /Management / Cost Updates   (1085)

- Invoicing
  - Enhanced the cancel special order processes to deal with Instock items as well.   (1089)

  - Because most dealers add items to service tickets before they actually start logging mechanic time, we've moved the labor control after the items control in the service ticket wizard.   (856)

Modules effected by this release :

Module   **Version**

Current Versions of all Modules related to project :

Module   **Version**   **Date**