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Project : Lizzy

Version : 2.1.1.5 (Final Release)

Date Release : 05-06-2009

Release Notes (Version 2.1.1.5)

- Accounting
 - Added new billing statement report that can be printed from Accounting Reports. (185)
 - Added new Electronic Funds Transfer payment type. It allows payment By the customer or To the customer. It creates a temporary list of transfers and then allows the business to process them one at the time or process as a batch of transfers at once. (173)
 - Added new General Ledger View form that allows user to select from a range of options and then view any matching entries found. (124)
 - Added new accounts receivable section that allows the manual creation of AR items, credits and entering payments. (58)
 - Added ability to create Purchase orders. Wrote new PO object that handles all transaction related to creating, updating, receiving and paying purchase orders. (8)
 - Added new Locate control to aid in locating purchase orders based on numerous parameters. (57)
 - Changed flow of purchase order so that if you choose a supplier it will only allow you to choose items that you purchase from that specific supplier. Removed the supplier choice from the item list screen. (56)
 - Cleaned up Purchase order processes for inventory and general PO's. (50)
- Calendar
 - Fixed Calendar views so that they do not show other users privately scheduled events. If a user adds a new event and tags it as private it will not show that event to anyone else when viewing the calendar. (209)
 - Added ability to calendar to link an event to the currently selected contact in the CRM section. If checked, Lizzy will link the event up to the contact as if it were a call back, providing you links to jump to logging a call or viewing their correspondence records. (170)
 - Fixed problem with some repeating calendar events not properly saving to the calendar. (204)
- CRM
 - Fixed problem with Log Correspondence page where field highlight colors were not properly changing. (98)
 - Added the URL to the view page of CRM Contact so that you could see any website the user is affiliated with and can click it to quickly open. (194)
 - We added a new checkbox to the Brands List report to only show purchased customers instead of showing all. This allows you to see what brands have been reported and tracked for all communicated contacts or only for those that have been tagged as having purchased something from you. (168)
 - Added ability to jump to a specific page on the View Correspondence control. (167)
 - Added function to Lizzy so that when you click a phone number to start a call, Lizzy will move you to the

log call screen automatically in order to start the log correspondence process for a phone call. Simply select a call type and you're done. (144)

- Cleaned up reports throughout PDM and CRM modules. (154)
- Added ability to export the located CRM contact list to an excel file that can be downloaded and viewed on the local computer system. To use, locate a contact via whatever parameters you want. Then click the Export button to export the entire resulting list to an excel file. (151)
- Fixed problem with some of the Customer Integer fields not showing on the locate screen. (174)
- Fixed problem with some Custom Radio fields not displaying properly on the edit screen. (137)
- Added report for Hot Topics that displays a graph of the top 10 Call Topics Categories based on number of calls and a second graph just below it that displays the top 10 Call Topic Categories based on the amount of time physically on the phone. To use it, select the date range, select the project and click the Retrieve button. (128)
- Added new Brands report that will show a list of brands along with a count for the number of customers you have that sell those brands. Clicking the link will open a list of specific contacts so that you can easily locate their records. (149)
- Added new Cancel method to all of the Log Correspondence types that will let you cancel the current phone call that you started. This will completely reverse the process of starting the call or email. (143)
- Added ability to View Correspondence page that allows you to enter additional notes to existing correspondence records without having to log separate entries. The new note will be appended to the existing note, with a time stamp of the fact that it was added. (111)
- Added new Sales Progress Report that displays list of customers that fit into each progress level and provides easy access to detail by clicking on the progress level itself to expand into list of actual customers. (100)
- Added ability to resend an email from the view correspondence page. (123)
- Added ability to resolve or unresolve an call topic directly from the view correspondence page. Appropriate security level must be enabled in the CRM / View Correspondence section for user to be able to do this. (112)
- Fixed linking problem when you add a note to an existing Open Topic. Lizzy was suppose to be attaching to any existing unused notes and she was not always handling this properly. (110)
- Added ability to generate fax coversheets and pages into a pdf that can then be emailed, faxed or printed. (103)
- Fixed problem with Logging a new call not showing Open Topics all the time. (109)
- Fixed problem with the new correspondence link not always opening open correspondence items when it first opens. (109)
- Added new icons to show exactly what type of correspondence you're looking at in the View Correspondence link. (97)
- Added new checkbox that allows you to enter an email entry but not actually send it out. This could be used in order to log an incoming email you received outside of Lizzy that you'd like to log as an email

but you don't want her to send it. (96)

- Added ability to specifically mark a supplier to show up in inventory list or unit list. This will help narrow down the number of suppliers that show in lists when they may have nothing to do with their respective parts. (51)

- General

- Added new text messaging feature to Lizzy where she will send text alerts to your phone based on settings in your user profile.

To set this feature up, go to the Settings / Security / My Profile page and at the bottom enter you phone number and your provider. Then check the boxes as to what types of events you'd like to be sent text messages for. From there, any time those types of activities happen, she will send you a text message to your phone.

If you have selected to be notified of new calendar events she will also alert you to scheduled calendar events that should be alerted. (134)

- Added Lizzy icon to the address bar inside the browser to help identify her in the browser tabs. (150)
- Modified browser processes so that it now resizes regions whenever you resize the browser to insure that everything fits on the page properly. Remove browser scroll bar since it now serves no purpose. (127)

- Inventory

- Added ability to turn the Automatic Inventory Analysis Algorithm (AIAA) on and off to the Inventory Settings control. The AIAA is used by Lizzy to help her to automatically adjust your inventory Min/Max Settings in order to assure you are always using numbers that reflect previous years sales volumes.

Control also allows you to enter Economic Adjustments to account for low or high economic reflections. (79)

- Added ability to adjust inventory items stock and bin information. To use, enter an item number, press tab key to move to each field and fill in, once you leave the bin location field it will add the entry to the grid below and set things up to enter another item.

Once you've finished select the Process button to have all items adjusted and their quantities entered into the system along with their GL hits. (13)

- Added View Sales History control to Inventory Section. (39)
- Finished the Create/Modify Kit controls that allow you to build up the kit and the parts that make it up. Not to be confused with Build Kit which is the physical act of building and assembling them. (78)
- Added new Costing control to show an items costing entries. (40)
- Dropped the Supplier ID from the Items list and created a link table that allows assigning parts to multiple suppliers. Added radio box list to allow me to quickly choose which suppliers I purchase an item from on the Items list setup screen. (52)

- Payroll

- Added new payroll summary report to the Payroll module. (130)
- Fixed problem with adjusting time sheets when the ending time needed to be changed and the change caused the system to enter the wrong date. (138)

- PDM
 - Changed attached customer links so they now show up inline and when clicking on email it logs email inside Lizzy instead of opening employees email client. (125)
 - Added ability for the Product Manager to delete tickets if they needed to. (131)
 - Increased width of Description fields in the Gantt chart list view. (152)
 - Added new developer alert that is sent to the developer whenever a ticket is brought from Open Support list and assigned to a specific developer. (122)
 - Fixed PDM Ticket and CRM Tickets so that if a non Employee logs in, it will only show them the notes that have been tagged as viewable in the PDM section. (92)
- Petro
 - Added new Dealer Summary report to Petrol module that shows list of dealers and their figures between a specified period of time. (176)
 - Added Store performance to show comparisons between different stores for a specific date range related to credit card data. (163)
 - Added new report to show Monthly performance for each dealership compared to others. (162)
 - Added Banking information to the Dealer page of the CRM contact detail wizard. This information will allow entry of EFT data that is used throughout Lizzy when making Payments using electronic funds. (177)
 - Added ability to Lizzy to process credit cards but then to wait a specified number of days before she actually adds the credits to the dealers records. This is set in the dealers account information screens. (177)
 - Added import process for Marathon FTP site. In order to utilize this feature the dealer will be required to setup an FTP account with Marathon and then provide Lizzy with this data in the Settings section. (171)
 - Created File Upload process to enable jobber to upload credit card data. (164)
 - Added ability to add a Manual EFT to the Transaction table as well as the ability to delete the entry. (157)
 - Added BP Import process for retrieving BP credit card data. (156)
 - Created a view EFT control that allows you to select an EFT then view a list of Dealers that have entries on it. Clicking each dealer will then provide detailed information for each line item along with totals. (155)
 - Added new Locate EFT menu and functions to aid in locating previously entered EFT's. (153)
- POS
 - Added AR Due Date in Days to the company settings as well as the customer setup screens to allow Lizzy to properly create a due date based on the terms setup for each customer or for the default if one is not set. (181)
- Settings
 - Added ability in Settings Accounting to setup AR Past due messages that are used to print on the Billing statements based on how late a persons account has become. (189)

- Fixed problem with Deleting Call Types in the CRM Settings section. (129)
- Added new fields to company information in settings / general section to allow entry of credit card processing gateway information. (95)

Modules effected by this release :

Module	Version
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Current Versions of all Modules related to project :

Module	Version	Date
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