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Project : Lizzy
Version : 2.1.1.8 (Beta Release)
Date Release : 08-12-2009

Release Notes (Version 2.1.1.8)

- Accounting
  - Added new AR Aging report that will display 30/60/90 information along with an expansion function that will show the actual customers themselves. When the report is initially opened it shows summary data only.   (427)

  - Added new Billing Statement report to the AR section.   (104)

  - Added new report to display AP Aging information.   (424)

  - Added ability to pay purchase orders through checking account. Select the Purchase Orders you wish to pay, enter the amounts for each and then select Pay and the system will automatically enter payment history for each, create a check and place each PO in the checks detail and hit the GL for respective payment.   (282)

  - Added ability to select the bin location to receive an item when receiving a purchase order.   (284)

- Calendar
  - Added ability to create an entry in payroll timesheet for a future event and associate it with a Vacation. These events will then automatically display on the calendar to show who's on vacation without the person having to create manual entries to insure everyone is aware of who is on vacation and who is not.   (325)

- CRM
  - Added PDM tickets to the merge process so that when you deactivate a user from the Additional Contacts section and select a person to merge their information to, it will not only move calendar and call back information but also assigned tickets.   (428)

  - Added new grid to the Hourly Correspondence report to show the days of week along with counts. This should help determining if its worth being open on certain days and how many employees need to be staffed to insure customer service is handled appropriately.   (425)

  - Reworked Ticket creation process to streamline the Customer Portal.   (403)

  - Added ability to locate contact based on "NOT" situations. For example, I could locate all customers that have purchased from me but that are NOT current.   (398)

  - Added ability to mass email contacts directly from the Contact Locate screen. Select the parameters you want to locate a group of customers with, select the mass email link and write your email. Lizzy will not only send the email but she'll also log the email to each of the contacts records so that you can keep up with who you sent them to later on.   (402)

  - Added ability in the CRM Contacts section to merge contact records. This is handy when someone submits their information through your website with an email address that you don't have on record and they end up with 2 records. Using the Merge feature you can merge the newer record along with its additional email address and any calls you might have logged over to the old record. Select Merge, lookup the new record, lookup the older record, review the process and click the Merge button to move the records and remove the newer information.   (406)

  - Added ability to Export a contact from the CRM section which allows you to download a zip file that can then be sent to anyone else using Lizzy to import into their CRM section. The export builds a csv file that can be used to import into other applications as well.   (370)

- Added new buttons to the log correspondence screen that allows you to quickly fill in the fact that you got no answer or that the answering machine picked up. To use, you simply start the call, click the appropriate button and then click hangup.   (356)

- Added new report that provides more detailed information about where customers are coming from based on Lead Source and website statistics. If you provide information on your web visits into the Settings / General / Website Stats section you will be provided with additional information at the bottom of the report that shows percentages between visits and new contacts added. Report has ability to track input from multiple websites and displays data in various formats.   (317)

- Invoicing
  - Added new Terms field to the Invoice to allow enter payment terms.   (312)

- PDM
  - Added Priority field to the Locate Ticket control.   (350)

  - Fixed Locate ticket screen so that you can't locate Personal Tickets of other users.   (351)

Modules effected by this release :

Module   **Version**

Current Versions of all Modules related to project :

Module   **Version**   **Date**