Project : Lizzy
Version : 2.2.0.1 (Final Release)
Date Release : 07-28-2010

Release Notes (Version 2.2.0.1)

- Accounting
  - Added Petty cash and Refinance options to the receipt for payment in purchase order section. (1355)
  - Added new payment detail control to payable section that shows previously made payments. (1350)
  - Added ability to pay purchase orders with COD checks. The following outlines the process.

    1) You must first locate the Supplier you wish to pay in the CRM system. Viewing the record is enough.

    2) Create new Check in the checking module and select the "Link To Current Contact" option located just above the pay to field.

    3) Select the checkbox at the top for COD Check.

    4) Fill in the amount and date

    5) Leave the account breakdown information blank at the bottom because the Purchase Order will be filling this in for you later.

    Next go to a purchase order you wish to pay with that check. The system will locate the check automatically and if more than one exists, it will use them in order they were created. It locates the check based on the supplier, the checking account number you have selected and the amount you are currently paying.

    If everything matches up, the system will then update the previously entered check with the new payment information and will add the breakdown and GL entries for you. This will then be linked back to the PO for payment breakdown information.

    There is a video documenting the process on nizex.com / videos / #12 Accounting / #1 A/P Payments with COD Checks. (1020)
  - Added new purchasing payment receipt that can be printed after payments are made. (1349)
  - Added ability to pay purchase orders with EFT/ACH payment type. (1305)
  - Added ability to pay purchase orders with Petty cash. (1165)
  - Added ability to refinance as well as using petty cash for paying purchase orders. See video on Train Me for menu item. (990)
  - Added ability to assign a check number when paying a purchase order. If the field is left blank the system will use the next available check number. If its filled in then it will use it instead. (1304)
  - Fixed problem with paging back and forth viewing gl hits (1275)
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  - Added ability to locate GL Hits based on who created the hits. (1190)
  - Enhanced the manual GL Adjustment Screen. (1193)

- Added ability to print GL Entries from the results of the GL locate screen. (1255)

- CRM
  - Added new option in company settings that lets you tell Lizzy to focus on the last name instead of the business name when it first opens. (1392)
  - Added ability to view Future release tickets are assigned to from the CRM view tickets control. (1310)
  - Added additional functionality to the Knowledgebase control so that you can now categorize items and then search on them. (1277)
- Email
  - Reworked email system to do a better job of storing from and to addresses to insure they integrated into the CRM system more fluidly. (1325)
  - Added ability to select all emails in the mailbox no matter how many pages there may be. Currently the select All link will highlight the currently viewable list but not the additional pages that may be in addition to. If there are more pages you'll get an additional link that will ask if you want to select them all and clicking will include all emails not just the ones on the current page. (1284)
  - Fixed problem with Email system removing contact emails when user elects to delete forever. Current version will keep any email linked to a contact record no matter who deletes it from their list of emails. (1293)
  - Added new Address book to the email system that allows you to keep track of both CRM and non CRM contacts. (725)
- General
  - Reworked backend email processes to enhance file attachments. (1379)
  - Changed Major Unit Supplier processes so that it no longer is required to look at or Use the settings / units / My Manufacturers control. Simply telling the system that a customer record is a supplier and that you want them to show in major unit inventory section is enough to handle all scenarios now. You no longer have to use My Manufacturers for anything except the eventual linking of contact records to the unit comparison module when its completed. (1302)
- Inventory
  - Fixed system so that you can not add the same supplier more than once for a single part number. (1367)
- Invoicing
  - Fixed problem with extended price not showing on invoice printout when discounts existed. Original was pushing the price half off the page. (1412)
  - Added new call list features to the special order list that enables logging and recording call information related to received parts. (1162)
  - Added Trade in information to the printout for invoice. (1358)
  - Added ability to upload a customer thank you letter for specific types of transactions that can later be used to email or print thank you letters with. (962)
  - Fixed problem where Estimates were printing on invoices when there were none to print. (1348)
  - Fixed problem where invoice totals were overlapping on printout. (1351)
  - Added prompt to invoice process to show if a part is sold below cost. (1133)

- Added Estimate Total Section to the Totals section of invoice printout. It only shows if there are estimates on the service ticket and provides summary information for all estimates attached. (1318)
- Added Estimates to invoice printout where required. (1327)
- Added both company and customer information to the invoice payment receipt. Because AR uses the same control this also fixes the problem over there. Earlier version was printing list of contact payments but wasn't showing who made the payments. (1306)

- Payroll
  - Fixed problem in payroll where the checks were not allowing you to select checking account other than default. (1422)
- Settings
  - Added new phone number type control to CRM Settings to enable users to create their own phone number types and added ability to set them quickly in create new contract control. (1406)
- Units
  - Fixed problem with receiving report with respect to major units where it was printing each unit too close together. (1413)
  - Added ability in company settings to set how you would like the system to auto-generate stock numbers when new units are added to the system. See Settings /General /Company Settings for more information. (1142)

Modules effected by this release :

Module	Version

Current Versions of all Modules related to project :

Module	Version	Date