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Project : Lizzy

Version : 2.1.1.7 (Final Release)

Date Release : 07/17/2009

Release Notes (Version 2.1.1.7)

- Accounting
 - Added new report to Accounting section that shows current list of past due AR items. (180)
- CRM
 - Added ability to relate one contact to another such as whether they are family members, friends and so on. Clicking the relate button on the view contact details page will allow you to search for the related business, clicking the view relations link will show the other businesses that have some relationship with the first. (338)
 - Added ability to upload files and attach them to KnowledgeBase (KB) items. This provides Lizzy with the ability to manage and track documents needed in the day to day operations of a business in one easy to manage location. (294)
 - Removed the delete button on Additional Contacts that are marked as primary to prevent removing the first and last name for a contact. (344)
 - Modified location of first, last, phone fields and moved into additional contacts to streamline data entry processes from main contact screens. Also added a primary contact process that allows you to tag which contact will be used on the views when viewing a contacts records. (335)
 - Added new privilege that allows someone to view another employees record. Without the privilege they will be able to see the record on the locate screen but won't be able to view their details. (337)
 - Added new graph to the reports section of CRM that displays call types broken into a pie chart to show the most popular call types versus the least popular. Also includes graph to show the types of communications used to communicate with customers. (308)
 - Limited security roles choice on Additional Contacts screen to those actually available depending on the customer type. For example: An employee would see all except for the Customer type and a non-Employee would only see customer type. (316)
 - Added new report to the CRM Reports section that displays a list of all contacts that have been set to log into the system at some level. Each are broken down by customer type and clicking the type will open and display the actual users where you can further drill down to the actual contact record if you wish. (305)
 - Added new search for Email Address to the CRM Locate screen. (314)
 - Added functions to CRM module so that if you deactivate an account it will automatically turn off all user logins that might have been setup on that account as well. (313)
- Dashboard
 - Added new section to inprocess report that shows invoices being worked on by different employees. (330)
- PDM
 - Removed popup for displaying Time Logged to tickets control and placed it inline instead. This fixes an earlier problem where having too many times logged to a single ticket where not all showing in the popup. (322)
- Settings

- Added new menu under Settings General that allows you to create domains and enter statistical data such as the number of visits to the website each month. This information is then used in CRM reports to compare against new customers to determine your close rates based on traffic. (318)
 - Added ability for nizex.com website to send SMS messages to Lizzy owners cell phones when new contacts have been added through the special sitecode script provided with Lizzy. (336)
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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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