



Managely Release Notes

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MANAGELY™

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Enhancements

Managely/Stages Integration

This integration provides the ability to create and link Customer, Site, and Systems between the Managely and the Stages platform. This can be done from several places within Managely:

- New Customer wizard
- Existing Customer site
- Existing Customer System

With these accounts linked, users can manage Stages contacts and configurations (zones), view Stages account data and history, and put individual systems (devices) or the entire account on-test, all from within Managely.

(PRO/Enterprise) Branch Management

Branching is a feature that separates General Ledger activity and records the activity to the branch specified. This feature adds the ability to specify a branch for any entity in the application that would affect the General Ledger to ensure that that activity is separated into the appropriate branch. Users can report and filter reports based on the branch that was associated with the activity to get a better understanding of how their branch is performing.

(PRO/Enterprise) Accounting Periods

Accounting periods are used to track general ledger activity within a given time frame. These periods are divided up into years that have 12 periods (months) within them. Users can manage their accounting periods, meaning the start of their fiscal year and the current year they would like to manage, as well as managing the opening and closing of periods to be worked in. Having the ability to open and close these periods helps ensure that all activity throughout the application is being done within the proper periods of business, as an accounting period with a status of anything other than open would prevent activity that posts to the general ledger from being posted to those periods.

(PRO/Enterprise) Categories

This feature groups financial transactions into user-defined categories for reporting purposes. A category may be a department within your company; a geographic location; a division of service; a profit center; or anything else that provides value in separation. A field for Category

has been added to all entities that can produce a general ledger entry that posts either to an income or expense type account, as categories only affect these areas of the general ledger.

Unapplied Cash/Credit GL Accounts/Flow

The General Ledger has new default accounts: Unapplied Cash and Unapplied Credit. These accounts function as pass-through accounts for Accounts Receivable in that if a payment or credit is created that is not applied to an invoice or if an existing payment or credit is unapplied from an invoice, those entities post a credit to the unapplied cash or unapplied credit accounts respectively as opposed to accounts receivable. This more accurately represents accounts receivables within the database.

General Ledger Balance Column

The General Ledger Details page has a new balance column that shows the balance of the GL account when that GL entry was created so that users can track how each entry has effected the balance of the GL account.

Excel Import/Export Journal Entry Option

Users can export and import journal entry details so that they do not have to manually enter journal entries for things that they would routinely need to enter.

(PRO/Enterprise) Multiple Customer Bill To

Users can add different 'Bill To's to customers, which represent different billing entities (addresses, contact information, etc.) associated with the customer and can be used when billing or sending information to the customer. Users can make a Bill To address primary (which is the address displayed for that customer and the address defaulted for use with invoices/credits) or default a Bill To address to be used for work orders or RMR.

Customer/Site Item Rate Defaults

Users can apply different default rates to their items for specific customers and sites that differ from the default rate created when setting up the item.

(PRO/Enterprise) Contract Management

Contract Management allows users to manage a customer's contracts at the customer level. Each contract has an expiration date. Also with this feature, the salesperson associated with the contract will automatically be notified by email when this expiration date is 30 days out. This lets users determine the warranty and recurring for a system based on the contract information, as well as connect a contract to an eForm for electronic signature/documentation of the contract.

Generate Remaining Term Invoice

When terminating a customer, users have the option to automatically generate an invoice for the remainder of the customer's active contract associated with the RMR if the customer chooses before the cancellation process is complete.

(PRO/Enterprise) RMR Grouping

RMR Grouping allows users to associate RMRs in the system to groups that can be created in the setup. This allows users to cycle or generate invoices only for RMRs that are associated with a specified group or groups.

(PRO/Enterprise) RMR Processing Day

Users can specify a specific date that RMRs will cycle through as opposed to always processing on the first of the month. This allows for flexibility in the processing of RMRs, giving users the ability to only process RMRs that occur at specific times of the month without processing all recurring that are set to cycle for that month.

RMR Rate Increase Day Exclusion option

There is an option to the rate increase where, before submitting the rate increase, users can specify 'Do not rate increase customers who have had a rate increase within 'x' days'.

RMR Rate Increase Custom fields

The RMR rate change grid has custom fields. This allows users to sort and filter based on those fields and only include the RMRs they wish to the rate increase in question.

(PRO/Enterprise) User Note/Document Access Level

Users can be assigned access levels to determine what notes and documents users can view or post. The levels available range from 1 to 3 where level 1 is general access; level 2 is internal access; and level 3 is management level access. Level 1 notes and documents can be viewed by all users in the database, including customer users with notes and documents that can be viewed from the customer portal. Level 2 notes and documents can be viewed by those users who have access to Managely, excluding any customer users. Level 3 documents can be viewed only by users who have a level 3 access level selected on their user profile.

Other Income/Expense GL Account Types

When creating GL accounts, there are two new Account Type choices: Other income and Other Expense.

The Other Income type is a credit balance type. This account type appears on the Profit & Loss Report at the bottom of the income section.

The Other Expense type is a debit balance type. This account type appears on the Profit & Loss Report at the bottom of the expense section.

Added Appointment Status to Open Appointments Grid

There is a new column on the appointments grid that shows the status of appointments:

- Scheduled - If no times have been added to the appointment (the color is grey)
- Dispatched - If only a dispatch time has been entered on the appointment (the color is blue)
- On-Site - If an arrival time has been entered on the appointment (the color is green)
- Completed - If a departed time has been entered on the appointment (the color is red)

Invoice Branch Functionality

Users can assign a branch to manual invoices. This is useful for companies using branches and saves time by allowing users to put a manual invoice in the correct branch immediately. To do this, open Accounts Receivable > Customers, and open a customer. On the Invoices tab, click +New Invoice. Add details for the invoice, and if needed choose a branch from the Branch list.

On the Chart of Accounts, removed the Balance Type

To refine the pages and clean the interface, the Balance Type column has been removed from the chart of accounts and from the GL register, and the Balance Type field has been removed from the GL Account details page.

Update Search Fields to Apply Search When Characters are Typed

To increase the response time for searches, the searches in the grids to begin showing results when users begin typing.

Roll Up Item

On the RMR, there is a new field called Roll Up. This is a list that allows user to select items that are marked as recurring.

If there are multiple RMRs on a customer; if the RMRs all have the same rollup item; and if the RMRs are cycled/generated on the same day, then the invoice template/pdf that gets sent or printed that includes those RMRs only shows the rollup item once and includes a total of all of the RMRs instead of displaying each RMR as an individual line item with individual descriptions and totals.

The quantity displayed on the invoice template/pdf is 1 even though it includes multiple RMRs, and the total amount for the line item adds up to the sum of all RMRs being cycled at that time.

If there is only one RMR being cycled and that RMR has a roll up item selected, the invoice template/pdf still displays the roll up item description.

The invoice in Managely does not display as the template/pdf does and shows all individual RMR line items that make up that invoice. The display change occurs on the template/pdf when the invoice is sent or printed.

User Access Level Setup

Users can be assigned an access level for reading and posting notes throughout the system. On the Setup > Company > User Manager page there is a field called Access Level. This is a list with these choices <blank>, Admin, Internal, Customer.

Users can access and post notes according to their access level. Customer users (customer portal) can only see customer level notes. Users other than customer and admin can see customer and internal notes. Admin users can see customer, internal, and admin level notes.