Managely Release Notes

January 2023

MANAGELY™
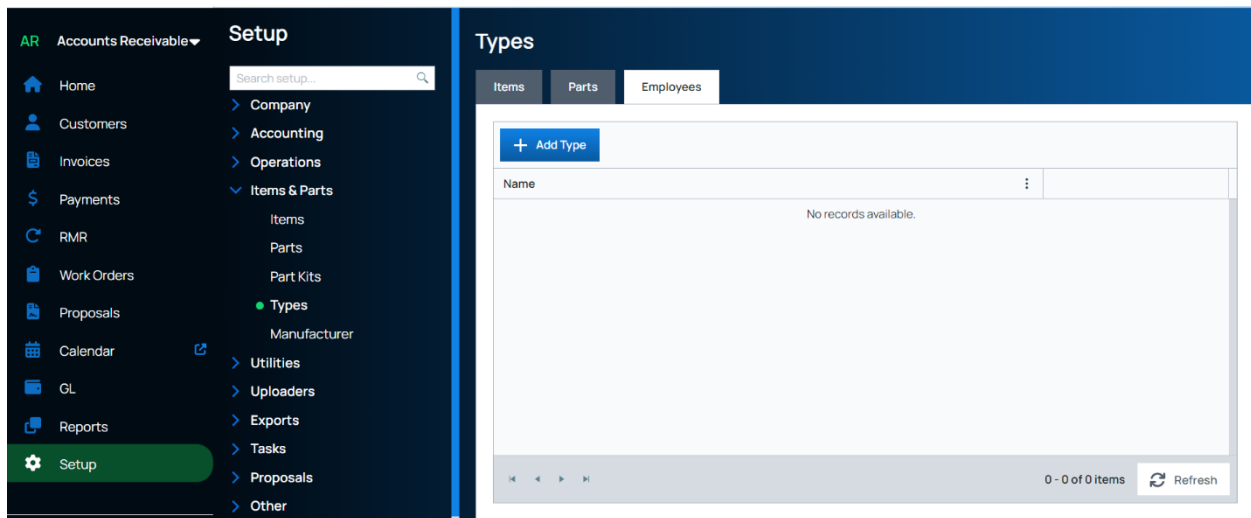
Contents

Enhancements

Employee Types

Users can create employee types (Setup > Items & Parts > Types > Employees). To add an employee type, click +Add Type. In the popup window, type a name. Users can edit and delete the employee types created. (This is a feature that will be expanded in future Managely releases.)

Application Corrections

Resolved Issues
Purchase Order Detail Page Missing Information Added missing information to the Purchase Order Detail page.
Remaining Term Invoice Changed a prompt when canceling that allows the user to choose whether to generate a remaining term invoice to display for Managely Enterprise license only.
Proposal Signature is not showing on the PDF Added the signature that was missing to proposals.
RMR Roll-up Item Not Functioning on Invoice Template The roll up item functionality now works correctly with the invoice template.

Resolved Issues
Task icon and count indicator shouldn't show for non-employees that don't have access
Resolved so that the task icon and counter do not appear for non-employees.
Issue with Data type 'contract' while adding single use form
When adding eForms, the Data Type 'Contract' is hidden unless the Managely license type is Enterprise.
work order TimeSheet Grid listing issue
The grid on the Work Order Timesheet tab now has pagination to show all timesheet entries.
Show open invoices when printing invoices
Resolved an issue with the show open invoices switch showing all invoices even when it was not selected.
Billing Cycle on Add Proposal RMR
Resolved this issue by adding a check to set the Billing Cycle of RMR of the proposal screen from the system defaults.
Add bank issues Backend
Changed text in the Setup->Bank accounts->Add bank ->Add bank popup from "Bank Account already assigned" to "Bank GL Account already assigned". Also, the Add bank form now stays open when the user acknowledges the pop error.
Master RMR Generation multiple invoices
Resolved an issue with a Master RMR generating a different invoice for every customer RMR selected "Invoice to Master." This now creates only one invoice with all customer RMR linked to it.