

Managely Release Notes

February 2023



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Enhancements

Scheduling Work Orders without Appointments

Using the calendar, users can now see work orders that do not have appointments and schedule them.

Open the calendar (Accounts Receivable > Calendar).

Click the button called **Schedule Unscheduled Work Orders**. The button shows the number of unscheduled work orders.

Calendar	+ Add Appointment	Schedule Unscheduled Work Orders: 587	Full Screen	Refresh (5 mins)	

A window opens showing the list of unscheduled work orders. Sort the list by any column.

Schedule Work Orders Without Appointments							
WO # :	:	:	Туре	Status	Total Amount		
<u>5963</u>	S	R	Alarm Install	+ New	\$554.00	Schedule	
<u>5964</u>	Tr	J	Alarm Install	+ New	\$650.24	Schedule	
<u>5965</u>	M	M	Alarm Install	+ New	\$3,556.47	Schedule	
<u>5966</u>	BI	S	Alarm Install	+ New	\$114.16	Schedule	
<u>3853</u>	D	D	Burg Install	+ New	\$225.00	Schedule	
2272	Bi	J	Burglar Alarm Installation	+ New	\$101.23	Schedule	
H 4 1	Image: Harmonic and the second se						



Find the work order in the list to schedule and click the **Schedule** button. This opens the New Event window.

New Event						×
Appointment Deta	ails					
Title			Start •	1/27/202	23 6:00 PM	*
Туре •	Work Order	v	End •	1/27/202	23 7:00 PM	***
All Day Event	NO					
Addl Days	0 Additional Day(s)					
Work Order						
New WO?	NO Create new work order from ap	opt.	Dis	spatch		Now
Customer •	Damage Control HQ - 4261	•		Arrival		 Now
Work Order •	CCTV Installation - Commercial - 7070	•	Com	pleted		 Now
Description			Tech	nnician •		
			Additional Te	chnicians		
	(<i>%</i> 0/500		Sync	OFF ?	
			F	PulseM	OFF ?	
	S (Save	X Cancel			

Enter the information needed to schedule the work order and click **Save**.

Commission GL Entries

When creating a work order that uses commission, Managely immediately posts a journal entry for the total amount of the commission. Where Managely posts the commission depends on what cost method is being used by the work order type on the work order.

If the work order type is not using WIP (work in process):

If the work order type is not using WIP, Managely posts the entire commission amount to a commission expense account (direct commission) and a deferred commission account when initially creating the work order. The work order type determines which accounts these are posted to.



If the work order type is using WIP or WIP accrual:

If the work order type is using WIP, Managely posts the entire commission amount to a WIP commission account and a deferred commission account when initially creating the work orders. When invoicing the work order (in part or in full), Managely recognizes the commission expense, which is the direct commission, and reverses the WIP commission. The work order type determines which accounts these are posted to.

Create Proposal Documents Tab

When creating a proposal, there is now a Documents tab, so users can add documents when creating a proposal.

1. To see this, create a proposal (Accounts Receivable > Proposal > + Add Proposal).

AR	Accounts Receivable 🗸	Proposals			
•	Home	Open/Closed	Accepte	d Rejected	
2	Customers				
1 01	Invoices	+ Add Prop	osal	Export to Excel	-
\$	Payments	Proposal	Site		:
C	RMR	<u>3174</u>	Alice Aa	cott - 48 Town Stree	t, Colum
		<u>3147</u>	Victoria	Miller - 419 Main St, I	Plymouth
	Work Orders	<u>3148</u>	Victoria	Miller - 419 Main St, I	Plymouth
= L ~	Proposals	<u>3149</u>	Victoria	Miller - 419 Main St, I	Plymouth

2. Choose a customer and a customer site.

Create Proposal		×
Customer • Customer Site •	Customer Search: name - cust #	•
	Ok Cancel	

3. Scroll down to see the tabs.



< Create Proposal #0	
	✓ Hide Details
List Price Status •	Open v
ŞU.00 Proposal Type •	Please Select 🔹
SO.00 PO Number	PO Number
Sales Price Proposal Date •	01/30/2023
\$0.00 Contact	Contact
Tax Total Phone	(111) 111-1111 🚥
ŞU.00 Email	Email
Proposal Total Follow Up	01/30/2023 16:21
RMR Total Est Closing	01/30/2023
\$0.00 Est Closing % •	0%
Source •	Google
Overview Items Parts Charges RMR 0 0 0 0	Notes Documents Complete 0 0
+ Add Document	. [

4. Click the Documents tab, and click + Add Document to add a document.

Adding System: Warranty and Warranty Start Date No Longer Required

When adding a system to a site, the **Warranty Labor**, **Warranty Part**, and **Warranty Start Date** fields are no longer required fields.

Add System					×
System Number •	System Number		Warranty Labor	Labor - 1 Year	•
Account Number	Account Number		Warranty Part	Parts - 1 Year	•
System Type •	Burglar Alarm	•	Warranty Start Date	1/30/2023	
Panel Type •		•	Service Level •	SVC T&M COM	•
			PONumber	PO Number	
Panel Location		1.			
		0/250	Comments		
Central Station		•			0/250
	✓	Save	Cancel		



(Pro) Work Order Type Part Configurations

When configuring parts for a work order type, users can turn on **Zero Part Price** and **Force Part Reconciliation**.

ork _				NO. Show Inactive Work Orde
	Description	Appointment Length (minutes)	Costing Method :	Show inactive work of de
+	Service Call	60	Direct Expense	🖋 Edit 前 Delete
+	Fire Inspection	120	Direct Expense	🖋 Edit 🛅 Delete
-	Fire Alarm Installation	480	Work In Process	🖋 Edit 🛅 Delete
	Tasks Items Parts	Commissions Labor	Phases	
				Save X Cance
	Zero Part Price Force Part Reconciliation	0		

Zero Part Price: This option controls whether the rate for each part on the Parts tab of a work order will default to the rate specified for that part in the setup. If this option is yes, all work order part rates will be set to zero. If this option is no, Managely will default to the part setup default rate. This option is typically set to yes if users are invoicing customers under a lump-sum contract amount.

Force Part Reconciliation Flag: If this option is yes, a user will not be allowed to close a work order unless all parts have been issued or if there are open purchase orders associated with the work order.

Application Corrections

Resolved Issues Purchase Order - "Rate" should be "Cost" On the Purchase Order page, Parts tab, the Rate label has been changed to Cost. When clicking the cost to edit the PO part, the Rate field has been changed to Cost.



Resolved Issues

Print Address and Print Phone Invoice Options

Resolved an issue where the Print address and Print phone options were not working with the Template Engine invoice form.

Issue in Commissions amount in database

Resolved an issue with commissions amount on the work order page and in the database displaying incorrectly.

Requested By and Email fields are being cleared out. (New Work Order.)

Resolved an issue where the Requested By and Email fields were being cleared out if using the Contact dropdown when filling out the information for a new work order.

There is no way to exit editing your profile other than signing out.

Resolved an issue leading to users having to sign out when editing their profiles.

No Branch is displayed for Items /Parts in Purchase Order

Resolved this issue so that users can set the branch while adding and editing items and parts.

Issue in Commissions amount in frontend

Corrected the commissions amount displayed on the work order commissions tab.

Print Address and Print Phone issue in Statement and Work Order

Resolved issues with the print address and print phone in statements and work orders.

AP Payment; check of open period based on bill date, should be payment date

Resolved this issue to check for any payments applied on a bill and use the payment date to determine if it is within an open period, rather than using the Bill date.

Deactivate Bank Account; message "Are you sure you want to delete?"

Changed the prompt when deactivating a bank account from "Are you sure you want to delete?" to "Are you sure you want to deactivate?"

"Parts Issued Quantity " issue

Resolved an issue with the quantity displayed on the work order details page parts tab.



Resolved Issues

Add bank issues Frontend

When adding a bank and trying to assign the same GL already used, changed the error message from "Bank Account already assigned" to say "Bank GL Account already assigned".

Also, if there is an error on the popup, the popup will now remain open instead of closing causing users to enter all information again.

Work Order Types > Commissions tab "Utilize Commissions" incorrect spelling

Corrected a spelling mistake on the Work Order Types Commission tab.

Data Entry: Work Orders>Recurring Work Orders>New Recurring Work Order

Resolved an error caused when a new recurring work order from an existing work order.

Generate Batch Statement is not utilizing the customer statement template

Updated the generate batch statement to use the template engine.

Error when clicking on Applied Payment under Bill

Resolved an error caused when clicking a link to an applied payment under a bill.

Accounts Payable Payment, Save button not accessible

On the Accounts Payable > Payment page, the total amount field is now read only.