Managely Release Notes

February 2023

MANAGELY™

Contents

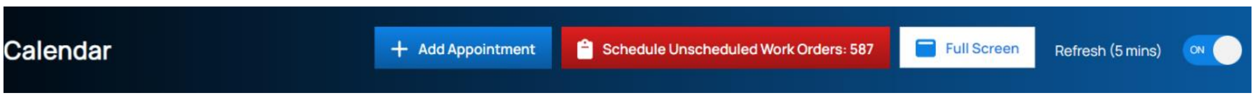
Enhancements

Scheduling Work Orders without Appointments

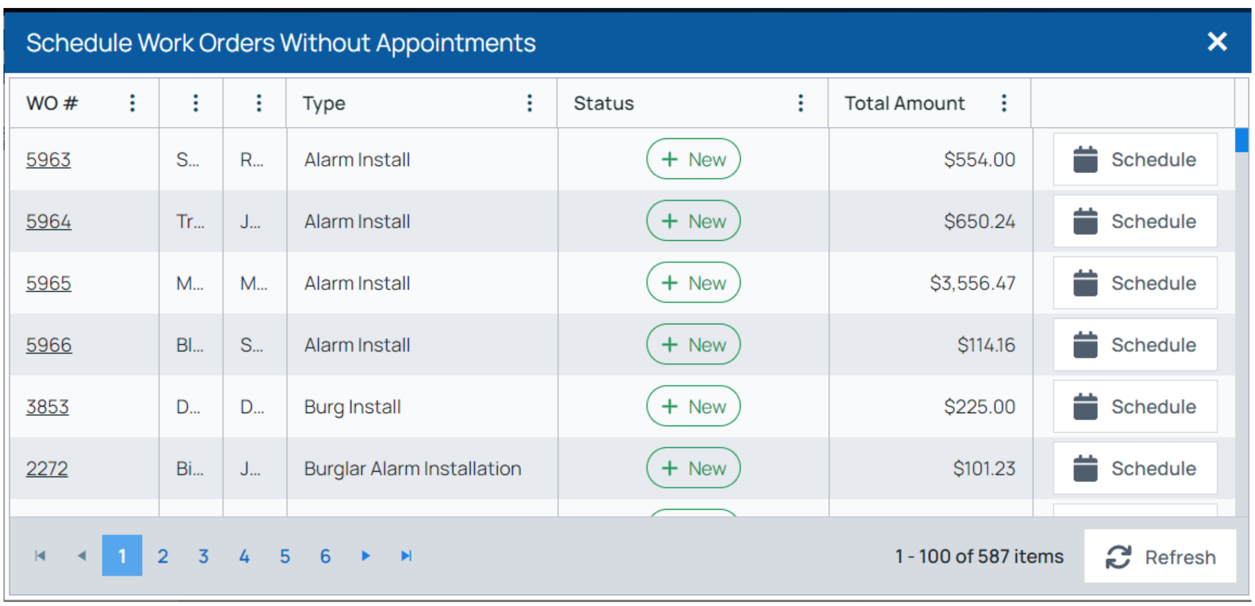
Using the calendar, users can now see work orders that do not have appointments and schedule them.

Open the calendar (Accounts Receivable > Calendar).

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



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

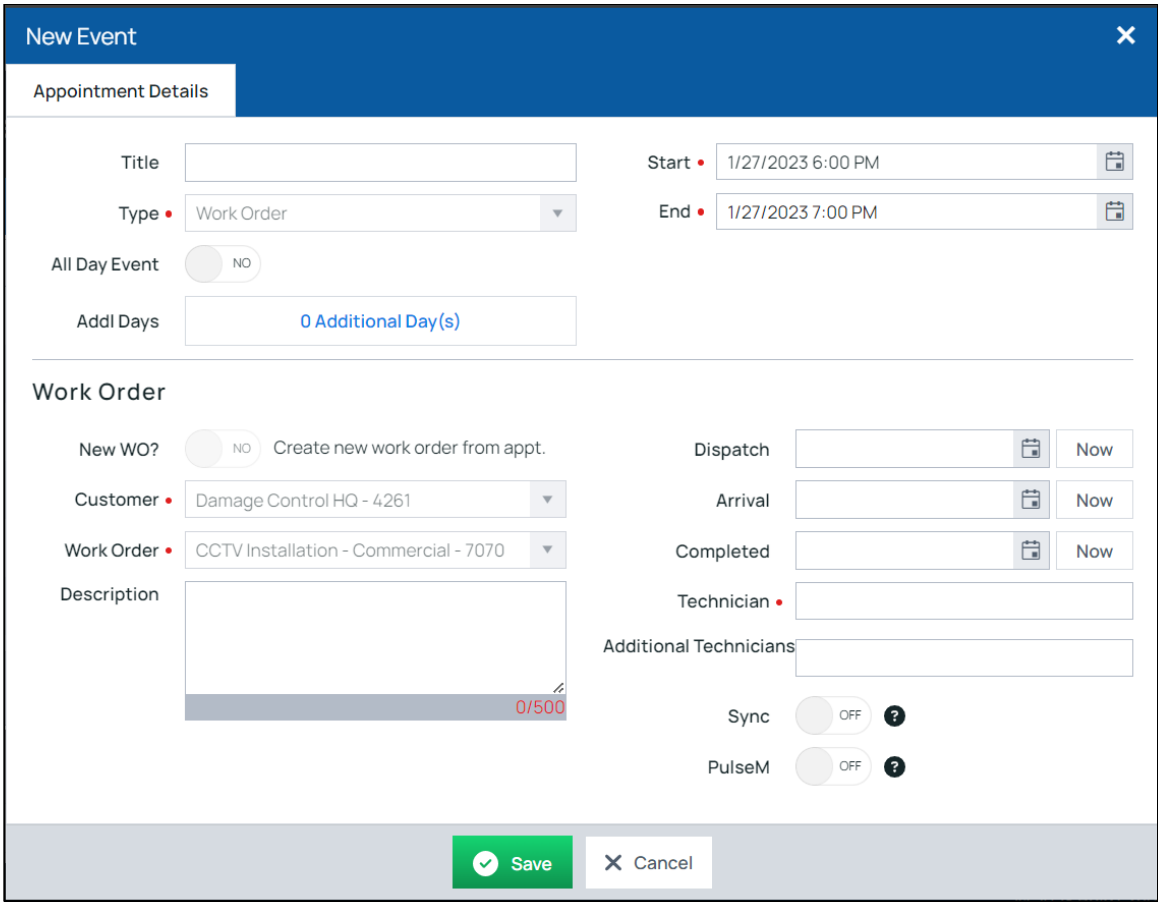


Schedule Work Orders Without Appointments

WO #			Type	Status	Total Amount	
5963	S...	R...	Alarm Install	New	$554.00	Schedule
5964	Tr...	J...	Alarm Install	New	$650.24	Schedule
5965	M...	M...	Alarm Install	New	$3,556.47	Schedule
5966	Bl...	S...	Alarm Install	New	$114.16	Schedule
3853	D...	D...	Burg Install	New	$225.00	Schedule
2272	Bi...	J...	Burglar Alarm Installation	New	$101.23	Schedule

1 2 3 4 5 6   1 - 100 of 587 items   Refresh

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



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.

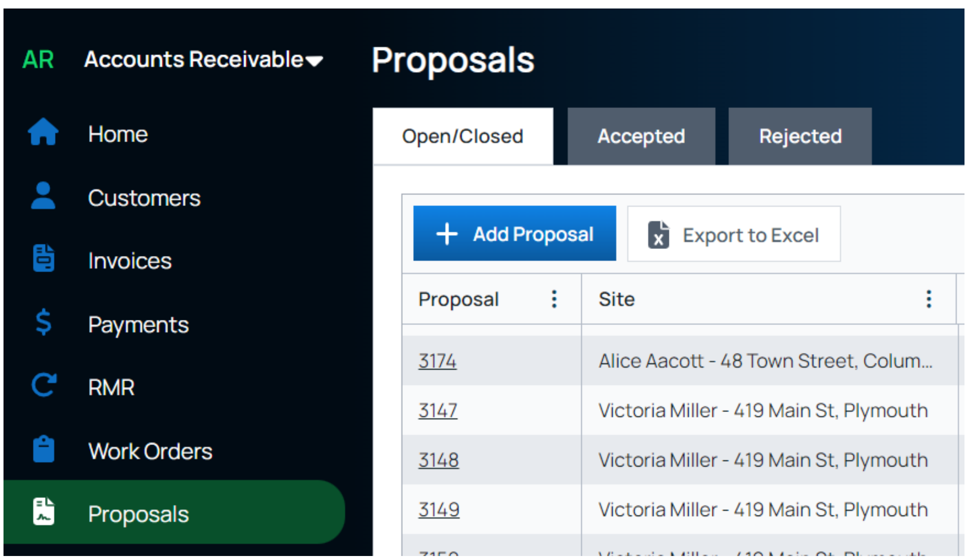
If the work order type is using WIP or WIP accrual:

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.

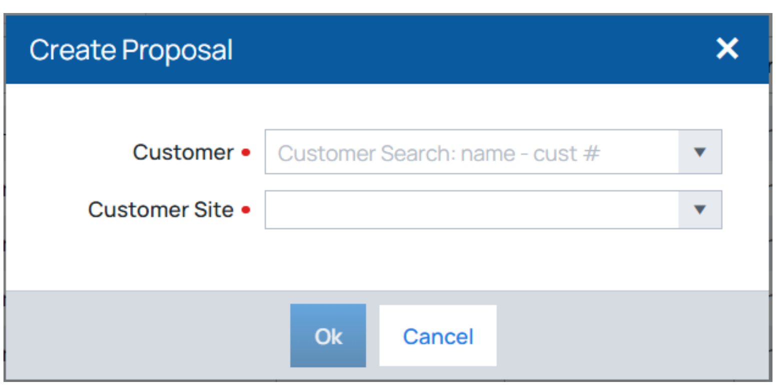
Create Proposal Documents Tab

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

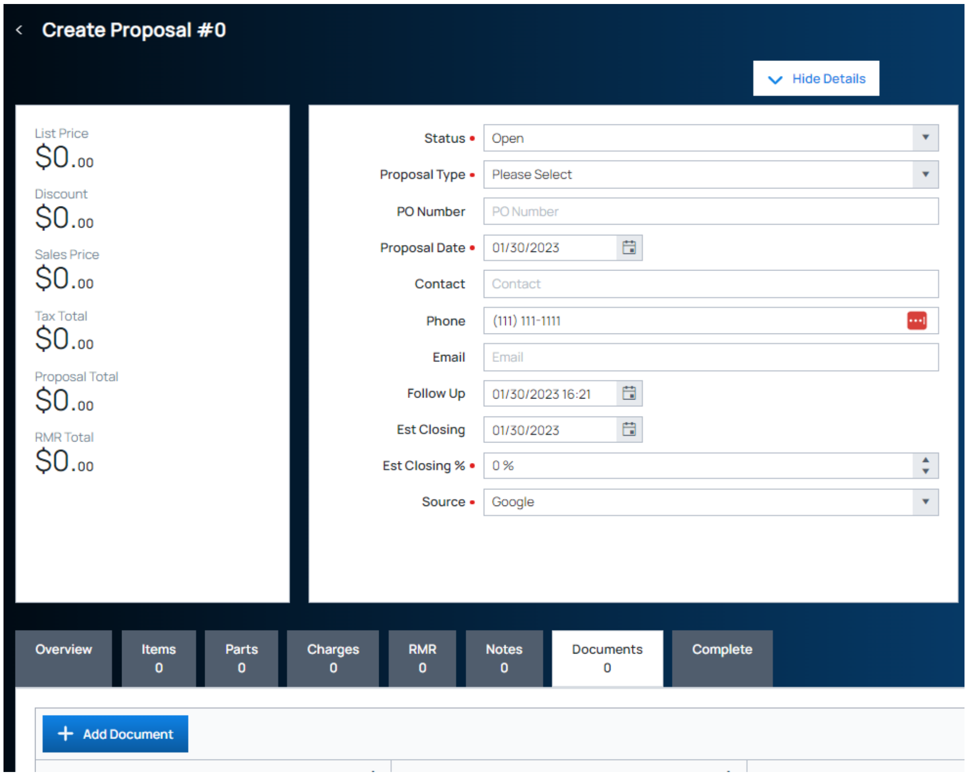
1. To see this, create a proposal (Accounts Receivable > Proposal > + Add Proposal).



2. Choose a customer and a customer site.



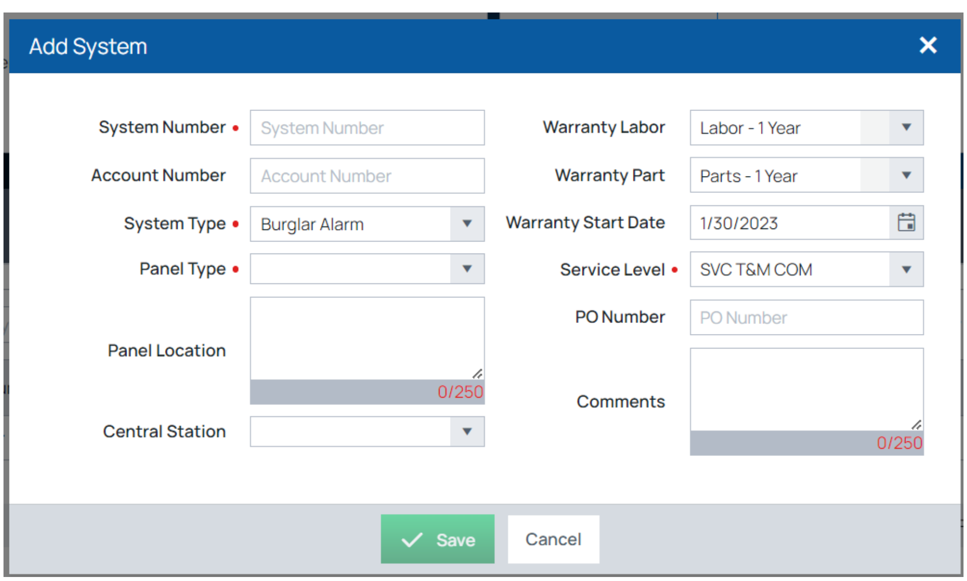
3. Scroll down to see the tabs.



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

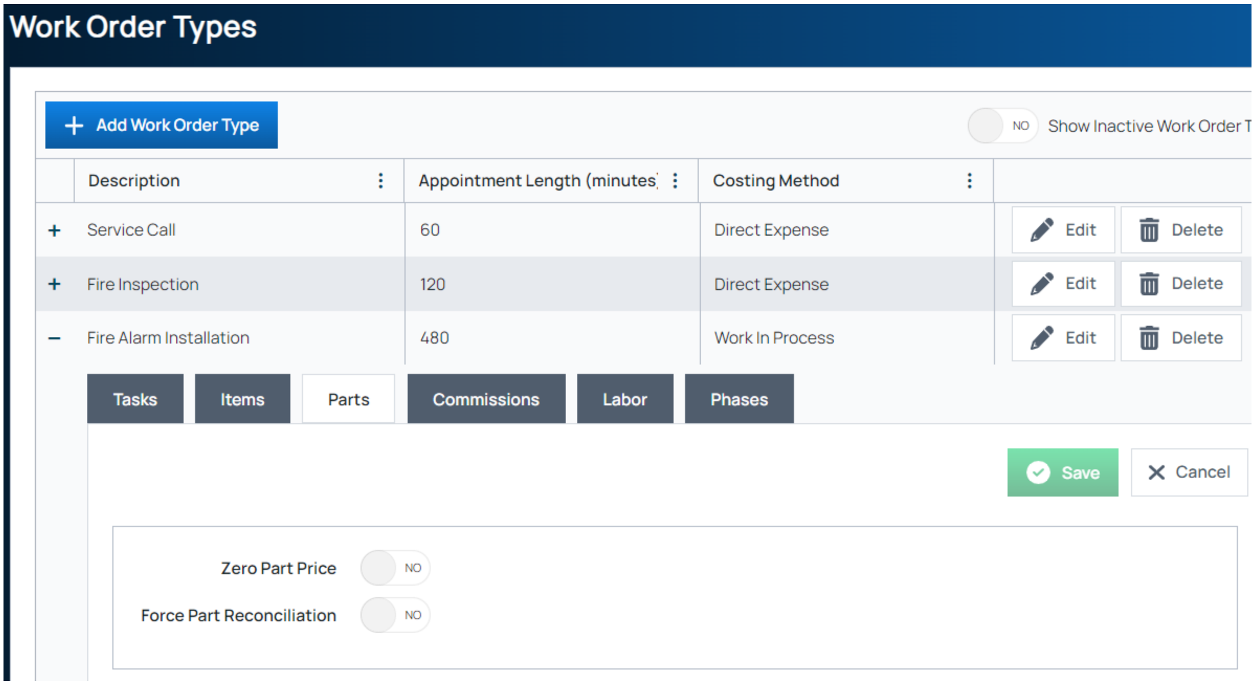
Adding System: Warranty and Warranty Start Date No Longer Required

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



(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**.



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 Commisions" 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.