# Managely Release Notes

March 2023

# Contents

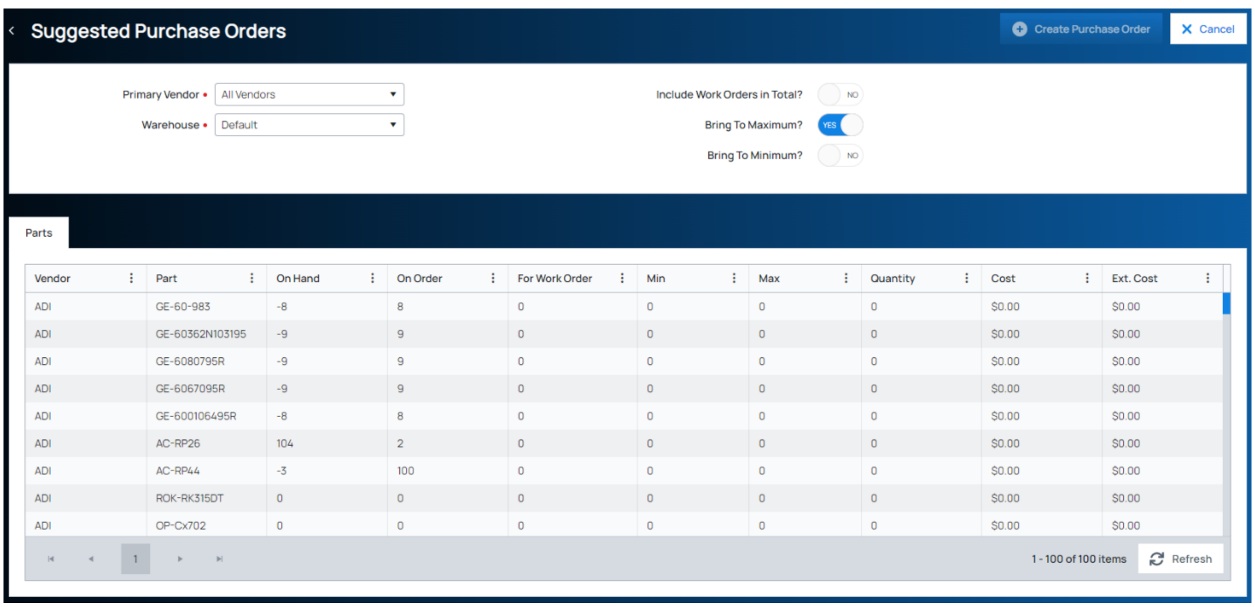
# Enhancements

## Default Invoice Template for Mail Delivery

When sending invoices and credits using the 'Mail' delivery method, regardless of any other defaults setup in Managely, the default template for invoices and credits is always used. This ensures that the mail provider, Sebis, can correctly identify addresses and place invoices in envelops so the address displays in the envelop window.

## Suggested Purchase Orders List

The Suggested Purchase Orders list (Accounts Payable > Purchase Orders > Suggested Purchase Order button) shows parts that are either below the maximum for the warehouse (when set to Bring to Maximum) or below the minimum for the warehouse (when set to Bring to Minimum). The list shows each part that should be added to a purchase order based on the warehouse minimum or maximum for that part.




The list populates with parts only after selecting a warehouse.

In the grid, the information about the parts can either be found on the part itself or from the warehouse. Vendor, Part, and Vendor Part are in the part setup. On order, For Work Order, Min, Max, Quantity, Cost, and Ext. Cost are in the warehouse.

There are filtering options available for the list:

Primary Vendor - When the Suggested Purchase Orders page opens, All Vendors is the default selection. To select one vendor, click the drop-down arrow to the right of this field and choose one.

Warehouse - The default warehouse automatically fills in this field. To select a different warehouse, click the drop-down arrow to the right of this field and choose one.

Include Work Orders In Total - If this option is selected, the suggested ordering quantities include all jobs where the part is listed on the Job Materials list where the part has not yet been issued to the job.

Bring to Maximum - If this option is selected, the suggested ordering quantities are based on the maximum setup value for the part for the warehouse selected. To calculate the suggested ordering quantity, the application performs these calculations:

- If the Include Jobs in Total is option selected, the suggested order quantity calculation is: (Maximum + For Job) - (On Hand + On Order)
- If the Include Jobs in Total option is not selected, the suggested order quantity calculation is: (Maximum - (On Hand + On Order))

Bring to Minimum - If this option is selected, the suggested ordering quantities are based on the minimum setup value for the part for the warehouse selected. To calculate the suggested ordering quantity, the application performs these calculations:

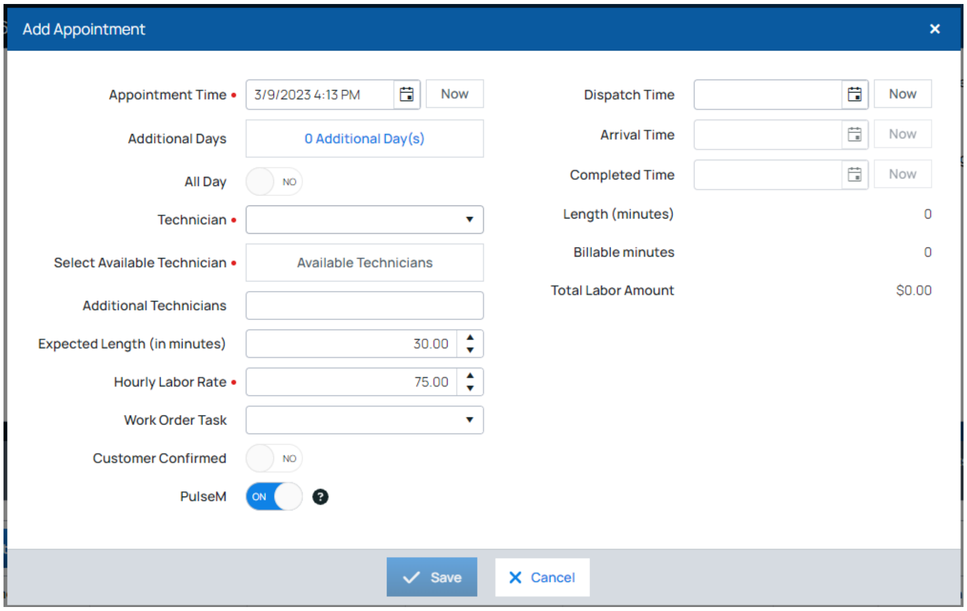
- If the Include Jobs in Total option is selected, the suggested order quantity calculation is: (Minimum + For Job) - (On Hand + On Order)
- If the Include Jobs in Total option is not selected, the suggested order quantity calculation is: (Minimum - (On Hand + On Order))

Users can add a purchase order from this page. Select a vendor from the vendor dropdown, and click the Create PO button; this opens the Add PO page with the purchase order populated with all the parts displayed in the Suggested PO window.

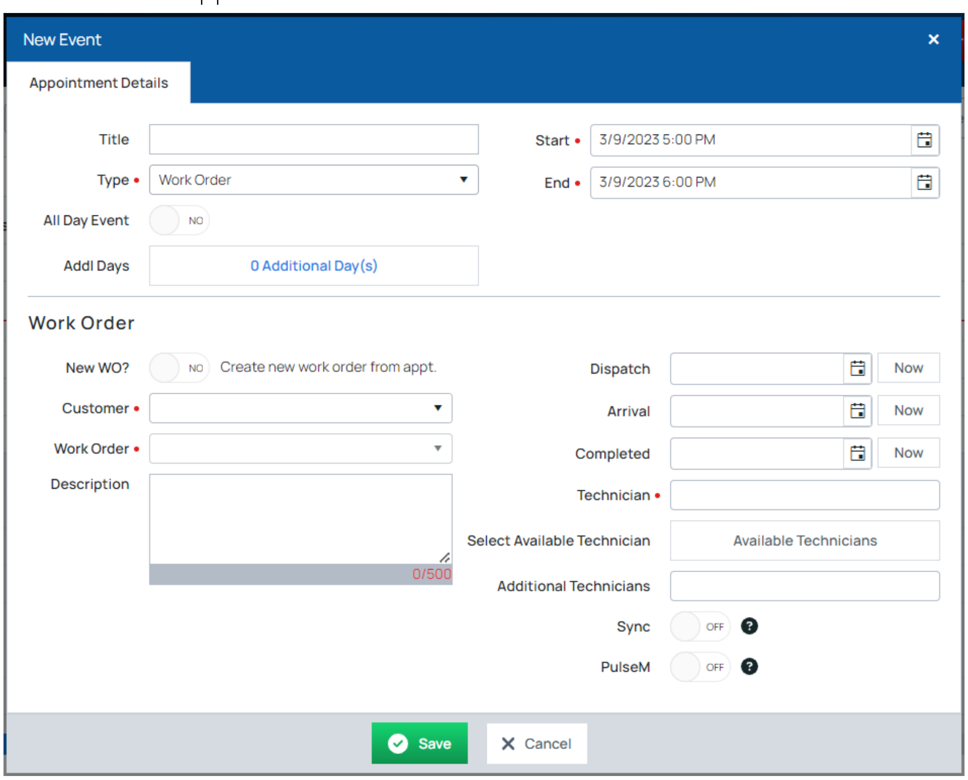
## (Pro) Technician Appointment Availability

There is a new option to schedule technicians by availability. This is through a button called Available Technicians. This button is on two pages:

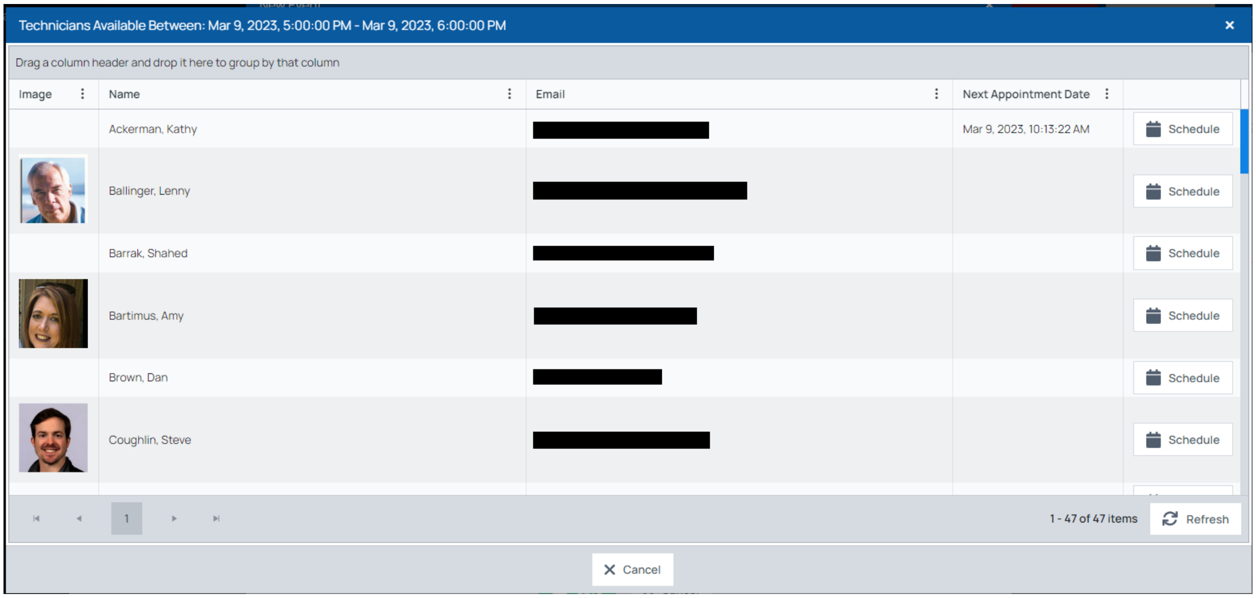
Work Order > Add Appointments




Calendar > Add Appointment



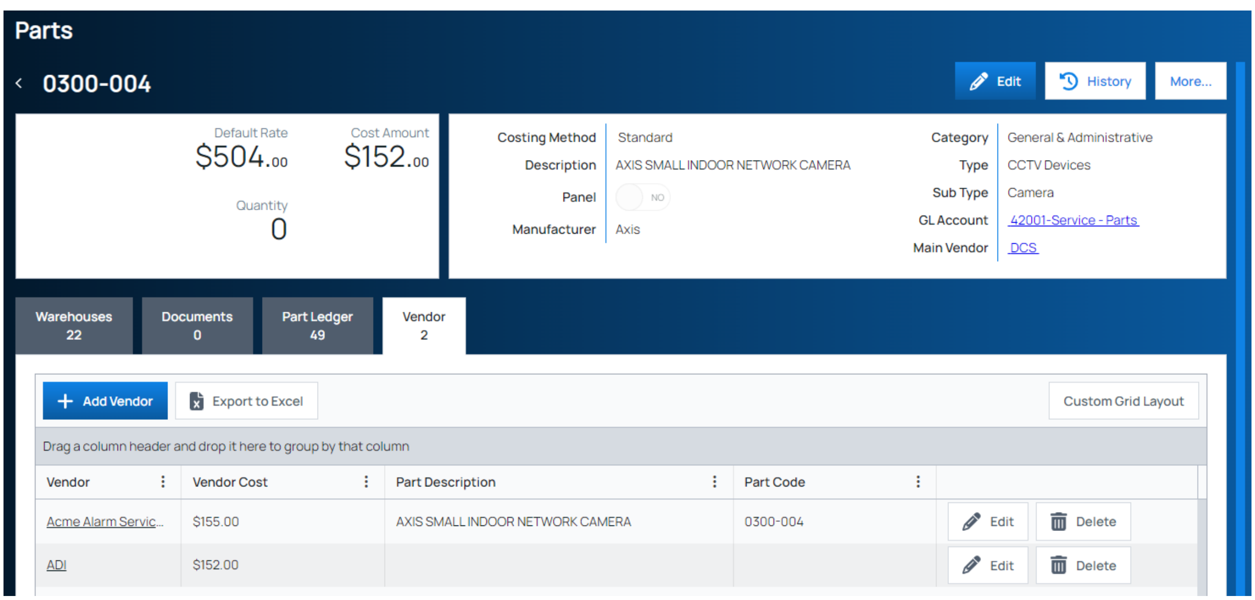

Click this button to open a grid of technicians who are available to be scheduled. The grid also shows if a technician has a following appointment, which means the technician might not actually be available due to travel time:



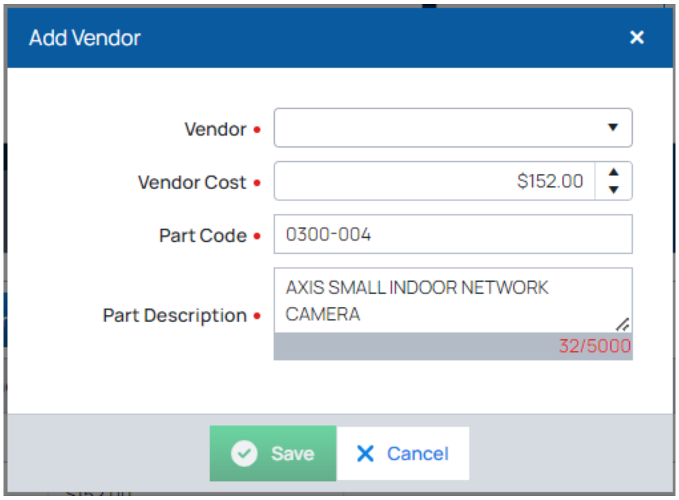

Click the Schedule button to add the technician to the appointment. If needed, add another technician by clicking the Available Technicians button again.

## (Pro) Parts Vendor Grid

On the Parts detail page (Setup > Items & Parts > Parts) there is a new Vendor tab. To see the Vendor tab, on the Parts page in the grid, click a Part Code link.



On the Vendor tab, click + Add Vendor to add a vendor for the part. If there is a vendor on the part, you can add another vendor. An Add Vendor popup opens:




Select a Vendor. The list shows all active vendors.

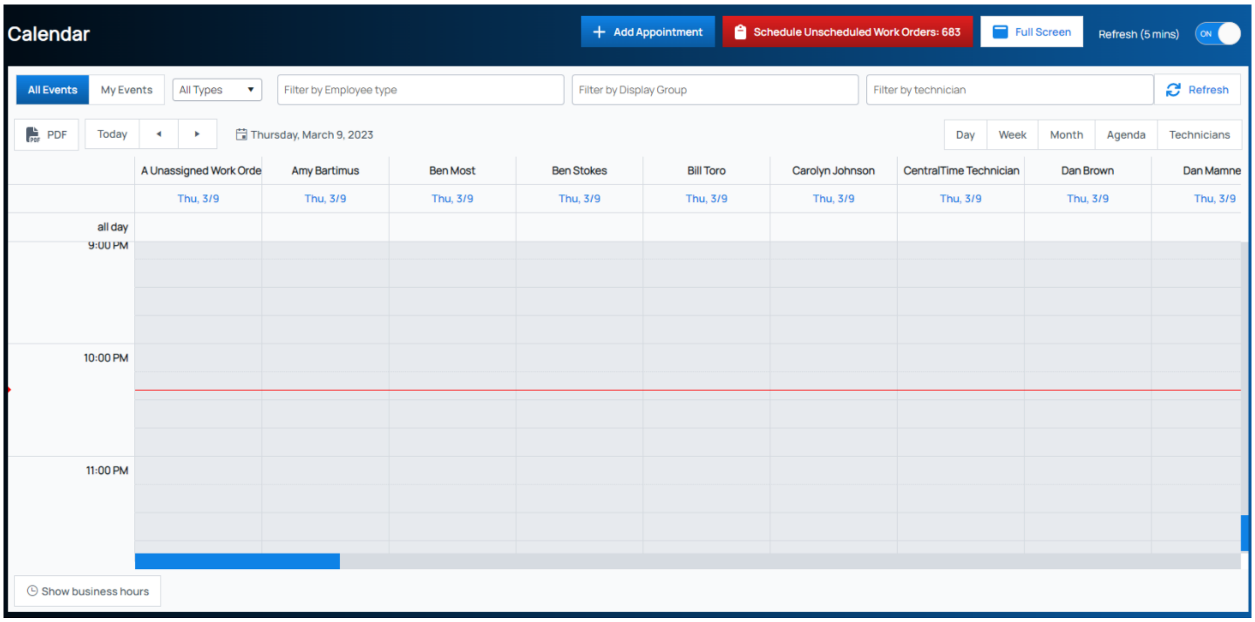
Enter a Vendor Cost for the part. The default comes from the Cost Amount on the part.

Type a Part Code. The default comes from Part Code on the part.

Type a Part Description. The default comes from the Description on the part.

# (Pro) Calendar Display Groups

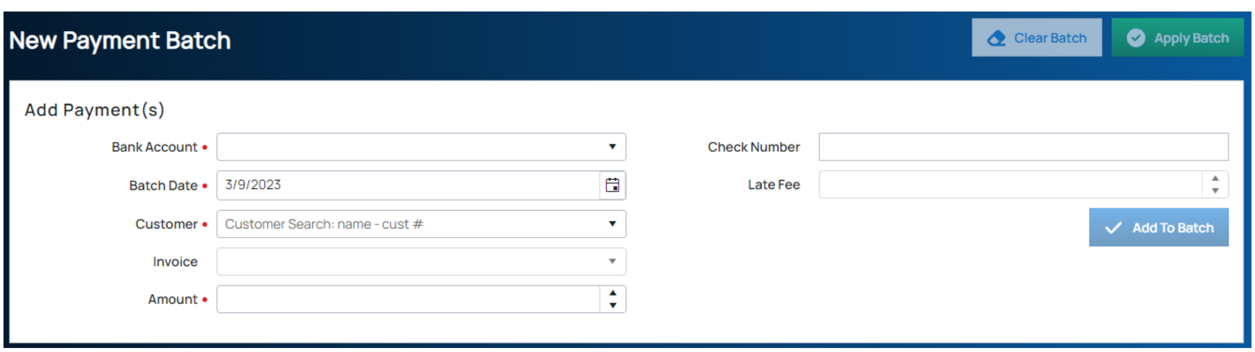
On the calendar, there is a new field called Filter by Display Group. Clicking in the field shows the Display Groups that have been set up (Setup > Operations > Display Groups). Employees are assigned to these display groups.




On the calendar, choosing a display group, or more than one, filters the calendar to display only appointments associated with employees assigned to those selected display groups.

# Creating Payments with the same Check Number in a Payment Batch

When users enter payment batches (Accounts Receivable > Payments > $ New Payment Batch), they can now use a Check Number more than once:

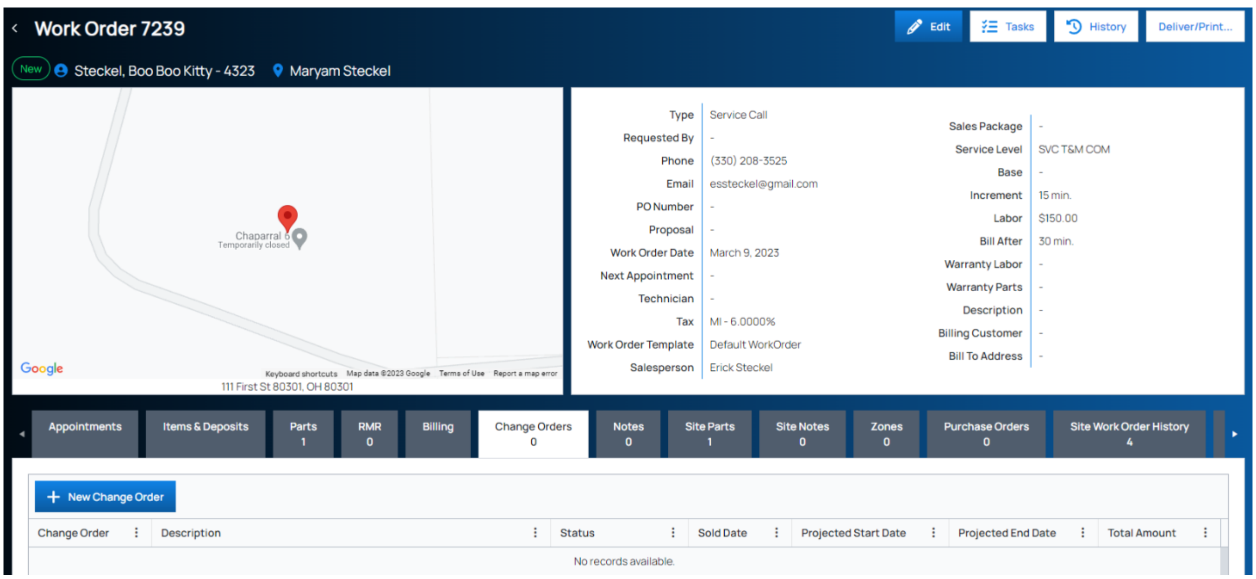


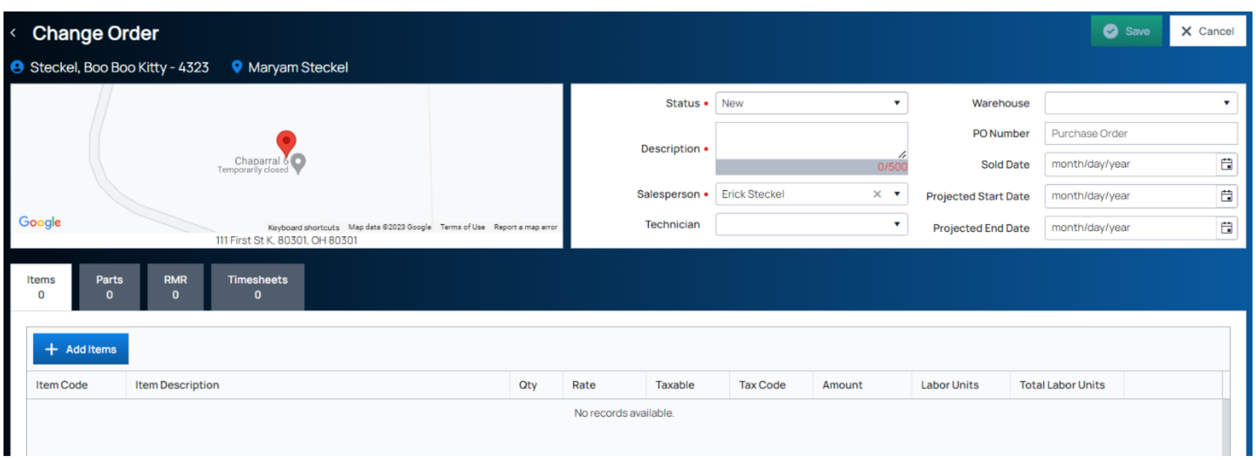
## Multiple Master Customer Bill To

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

## (Pro) Change Orders

Work orders now have a tab for change orders. Change orders have many similarities with work orders. Change orders cannot be created unless they are associated with a work order. Change orders have top level information, as well as separate tabs to associate the changes that occur with the change order.



These are the top-level fields associated with a change order (* indicates required):

- Work Order* – This is the work order that the change order is attached to.
- Work Order Type – This is the work order type from the selected work order. Users cannot edit this.
- Status* – Users can select from work order statuses.
- Description* – This is a 500-character length text field.
- Tax Rate – This defaults to the tax rate associated with the selected work order for the change order. Users cannot edit this.
- Branch – This defaults to the branch associated with the selected work order for the change order. Users cannot edit this.
- Warehouse – This defaults to the warehouse associated with the selected work order for the change order. Users can change this.
- Technician – This defaults to the technician associated with the selected work order for the change order. Users can change this.
- Salesperson* – This defaults to the salesperson associated with the selected work order for the change order. Users can change this.
- PO Number – This defaults to the PO Number associated with the selected work order for the change order. Users can change this.
- Sold Date – Users can change the date field.
- Projected Start Date – Users can change the date field.
- Projected End Date – Users can change the date field. This cannot be earlier than the Projected Start Date field.

These are the tabs associated with each change order:

- Items
- Parts
- Recurring
- Commissions
- Tasks
- Timesheets
- Notes

## (Pro) Appointment Work Order Task Field

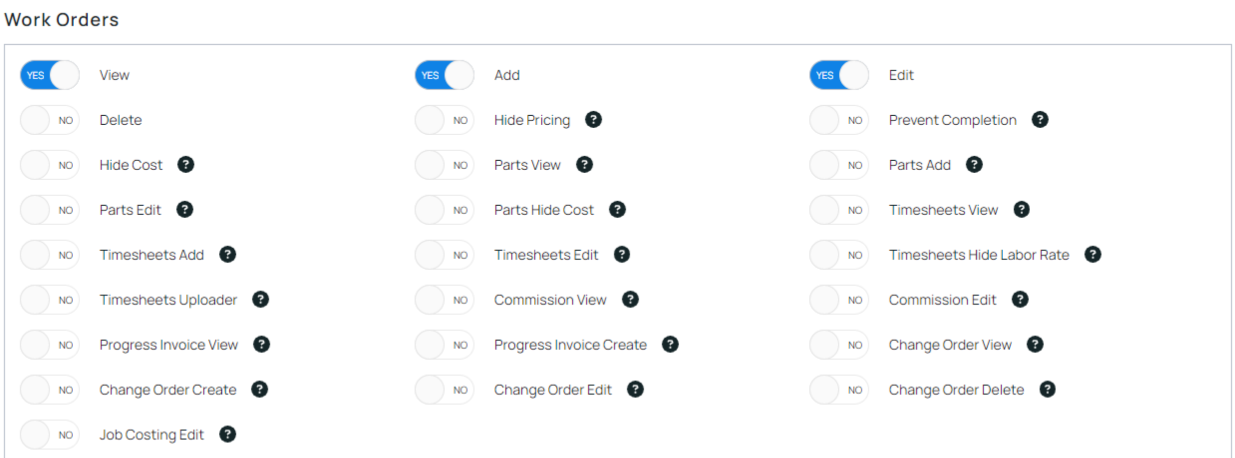
When creating a work order appointment, select a task in the Task field. When the appointment is completed, a timesheet entry is created for it and records the hours and labor cost for that appointment. (Currently, the timesheet does not show the work order task.)

This allows tracking efficiencies for specific tasks when comparing the actual hours against the estimated hours for the task.

## (Pro) Work Order Job Costing Estimate Edit Permission

There is a new permission under the Work Orders section for editing estimated job costing. If this permission is turned on, the user can edit estimated costs on the job costing tab associated with a work order.

By default, this permission is on for a manager and administrator; it is off for all other user roles.



# Application Corrections

| Resolved Issues |
|---|
| **Warehouse Inventory Export Error**<br>Resolved an issue with the value displays the standard cost: changed to (QTY * Standard Cost) |
| **Data Entry: New Customer>Next to System> Spins and does nothing**<br>This requires one of these user permissions: Parts View permission under the Work Orders section; Inventory Read permission under the Inventory section; Add permission under the Customer Manager section; or the Administrator user role. |
| **Invoices due in 1 day do not appear on the AR Aging report**<br>Resolved so that invoices due in one day appear on the AR Aging Report. |
| **Add Status on Proposal Status displays Add Estimate Status**<br>Changed the text from Add Estimate Status to Add Proposal Status. |
| **Pay Invoice - Late Fee Increase/Decrease Value Not Functioning Correctly**<br>Resolved so that users can input the late fee amount (that is greater than or equal to 0) but cannot enter an amount that is greater than late fee set in customer. |
| **Invoice logo does not appear on the Customer Statements**<br>Resolved this issue so that logos that users add correctly appear on customer statements. |
| **Zip Code for Customer User Registration Not Accepting Canadian Zip Codes**<br>Resolved so that the zip code field in the customer registration page can accommodate Canadian postal codes. |
| **Technicians should be sorted by Name on calendar**<br>Resolved by changing the sort order of the Filter by technician field to show technician in order by first name. |
| **(Managely) Cannot enter area code in zip code area (they are in Canada)**<br>Resolved so that new customer registration will accept Canadian postal codes. |

| Resolved Issues |
| --- |
| **Forte Authorization Errors- duplicate accounts; can't delete**<br>Resolved by adding the ability to delete accounts. |
| **Applying Payment, Amount shows $0 when there is a balance**<br>Resolved so the customer balance shows as expected. |
| **Work Order Tax and Part Total Incorrect**<br>Resolved an issue where sales tax was not being calculated on work orders. |
| **Cannot export full zone list into excel, it only exports 1 page**<br>Resolved an issue that was exporting one page of zones to Excel instead of the full list. |
| **Work Order Amounts calculated incorrectly when Site or System has Labor or Part Warranty**<br>Resolved an issue with saving work orders where the calculation for amount fields was not taking into account the warranty for labor or parts. |
| **CustomerBillToo missing from credit screen**<br>This was changed so the Bill To will appear on the New Credit page. |