Managely Release Notes
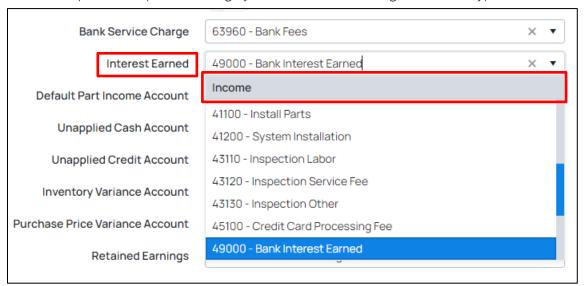
April 2023

MANAGELY™

Contents

Enhancements

(Pro) Use Vendor Part information while creating Purchase Orders for Part Kits

Managely uses vendor part information when users add part kits to work orders and create purchase orders for the part kits. Vendor information comes from the parts (Setup > Items & Parts > Parts > Part Vendor tab) that are part of the part kits (Setup > Items & Parts > Part Kits).

GL Dropdown Field Changes

The GL dropdown fields have been changed to show only the type of GL accounts that can be used in the field. The top of the dropdown has a grey bar as a header showing the account type.

Bank Service Charge	63960 - Bank Fees ✕ ▼
Interest Earned	49000 - Bank Interest Earned ✕ ▼
	Income
Default Part Income Account	41100 - Install Parts
Unapplied Cash Account	41200 - System Installation
Unapplied Credit Account	43110 - Inspection Labor
	43120 - Inspection Service Fee
Inventory Variance Account	43130 - Inspection Other
Purchase Price Variance Account	45100 - Credit Card Processing Fee
Retained Earnings	**49000 - Bank Interest Earned**

Application Corrections

Resolved Issues
Filtering by Tech in work orders only works by last name Resolved an issue with filtering so that now filtering also works on first name.
Error Message when clicking on cc/echeck tab- customer 1703 and 1704 Resolved this issue by removing the requirement for a last name for a Forte customer.
Work Order Template The work order template always defaulted to the customer default template, even if a template was set on the work order. This has been resolved so that this only happens if the work order template is undefined.
AR Aging Report not working Resolved this issue to be able to run a back dated AR Aging Report. In addition, the report runs more quickly.
Vendor Credit error when saving Resolved this error so that when creating a vendor bill, saving, and navigating to the Create New Credit page, all bill items/part/part kits and counts are properly cleared