Managely Release Notes

April 2023

MANAGELY™

Contents

Enhancements

(Pro)Work Order Type Task Triggers

When adding a task to a work order type or editing an existing one, users can specify when saving a task with a completed status that specified users will get notified; a progress invoice will be generated; or both actions can happen.

There are new fields on the Edit Work Order Type Tasks. To see these, open Setup > Operation > Work Order Types. Click the plus button beside a work order type to expand it. One the tasks tab, add a task or edit an existing one.

Send Complete Notification? By default, this is No. Switch to Yes to open the next field.

Send Notification To: Click in the field for a list of employees. Select the checkbox beside an employee name to select for notification. You can select more than one employee.

Invoice Upon Completion? By default, this is No. Switch to Yes to open the next field.

Invoice %: This is a numeric field. Type a percent for the created invoice when the task is completed. Note: Type 1 for 100%; type a decimal number for a percent less than 100. For example, .1 for 10%.

Work Order Task Tab

On the Work Order Tasks tab, when editing the task that generates a progress invoice, and selecting a complete status, an Invoice % dropdown appears under the status dropdown. It defaults to the percentage set on the work order type. The maximum percentage for all progress invoices combined is

capped at 100%. (Note: Type 1 for 100%; type a decimal number for a percent less than 100. For example, .1 for 10%.)

If the work order has change orders on it, there is also a grid shown to select any number of change orders to apply the progress invoice to:
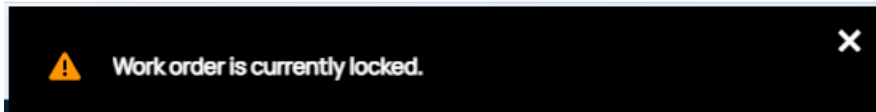
(Pro) Work Order Lock Functionality

Work orders are locked if a change order has been created for the work order or if the work order has been partially invoiced. When a work order is locked, users who can access the work order cannot add parts or items to the work order.

If a work order is locked, there is a message for users at the top when they open the work order.

(Pro) Vendor Part Setup System Defaults

There are two new fields for System Defaults. (Setup > Company > System Defaults)

Purchase Order Standard Cost: When set to Yes, new purchase orders will use the standard cost for parts instead of the vendor cost. This is a global setting used for all parts and vendors when a purchase order is created. By default, this is No.

Auto Vendor Part Cost Update: When set to Yes, a part's vendor cost is updated with the most recent purchase order cost associated with the part. This is a global setting used for all parts and vendors when a purchase order is created. By default, this is No.

System Defaults

Field	Value
Next Purchase Order Number •	1193
Accounting Open Date •	12/29/1969
Fiscal Year Starts •	10/31/2023
Labor Warranty •	Labor - 1 Year
Part Warranty •	Parts - 1 Year
Service Level •	Time and Material - Commercial
Work Order Type •	Service Call
Invoice Delivery •	Print
New Work Order Status •	New
CC/eChecks Funding Month •	Current Month
Select Day for RMR Cycle	YES
Show Late Fees on Invoice	YES
Auto Apply Payments/Credits	NO
Email RMR Payment Receipt	YES
Purchase Order standard Cost	NO
Auto Vendor Part Cost Update	NO

Application Corrections

Resolved Issues
ISSUE: Invoices not specifying that a customer is on autopay We resolved this issue by adding an area on the invoice to display autopay information for the customer.
Managely: General Slowness When Adding Systems Resolved this by changing the programming logic for the Panel dropdown list used when adding a system.
Managely: Place cursor to the start/search bar We added a focus to the search bar when adding an item and adding a part. We also removed the wait spinner on the page and moved the page loading to the grid spinner for adding items.
Invoices take a long time to load We improved the loading time for invoices discovered when a customer has many sites.
Payment issue We resolved an issue that was causing duplicate checks discovered when posting a payment to a vendor as ACH.
Cannot see over 200 payments when posting new payment batch We resolved this issue by adding a paging button so that users can see payments if there are over 200.