



Managely Release Notes

May 2023

MANAGELY™

Contents

Enhancements..... 2

 Customer Details Page has Autopay Field..... 2

Application Corrections 2

 System Defaults..... 2

 Generating Invoices Does Not Work 2

 Late fee not being applied to total payment..... 2

 Service Ticket details do not save to calendar..... 2

 RMR: Last RMR 3

Enhancements

Customer Details Page has Autopay Field

Users can now see if a customer is set up for autopayment. There is now an AutoPay field on the customer details page.

A Business Company
Customer #3501 Active Normal Residential • Since 6/11/21

Total Balance Due: \$342.82 | Total RMR: \$32.00

Customer Aging Chart:

Category	Value
Current	0
1-30 Days	0
31-60 Days	0
61-90 Days	0
91+	100

Address: 123 Main St, Columbus, OH 43204
 Phone: (888) 555-1234
 Cell: -
 Email: Tom.Utley@boldgroup.com
 Branch: -
 Auto Pay: Credit Card (1111)

Salesperson: John Doe
 PO Number: -
 Last Statement: January 14, 2022
 Default Term: Due on Receipt
 Part Pricing Level: -
 Delivery Method: Email
 Delivery RMR Inv:

Comments: test comment

Application Corrections

Resolved Issues

System Defaults

Resolved an issue where the default vendor combo box would only pull down the first 50 vendors. This combo box is now searchable to find vendors more easily.

Generating Invoices Does Not Work

When creating RMR, the system was retrieving all sites and systems associated with the customer, however this took a long time if the customer had many sites. Now the system retrieves only the customer name, which improves the speed of the RMR creation process.

Late fee not being applied to total payment

When checking to apply a late fee, the system was checking both the date and time. We resolved this to check only the date.

Service Ticket details do not save to calendar

The appointment description box was not displaying the necessary information. There is now a read-only textbox (called WO Desc) on the appointment screen to show the work order description accurately.

Resolved Issues

RMR: Last RMR

We resolved an issue with the time conversion for the rate change grid and linked the last rates changes column to the rate change date.