



Managely Release Notes

May 2023

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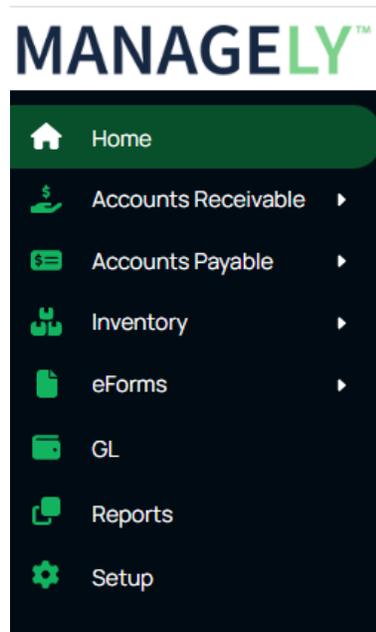
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Enhancements

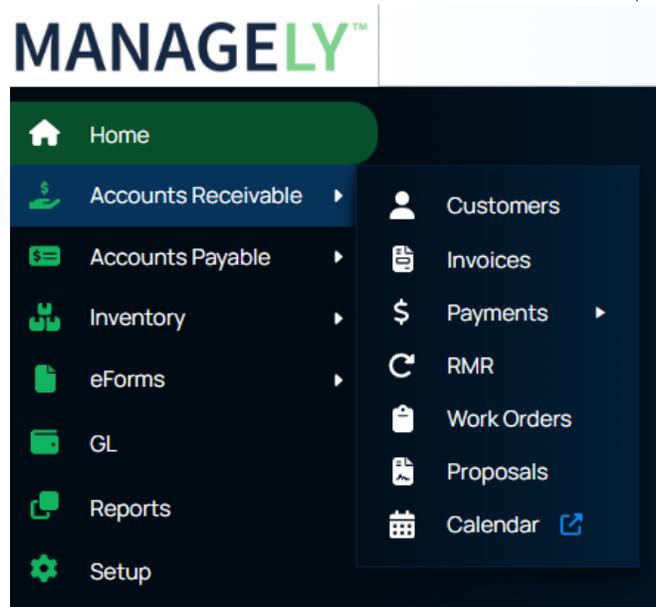
Managely Sidebar New Design

We have changed the design of the Managely sidebar menu to improve navigation. All modules are shown in the sidebar menu (depending on user role). We have eliminated the field for switching modules.

New sidebar:

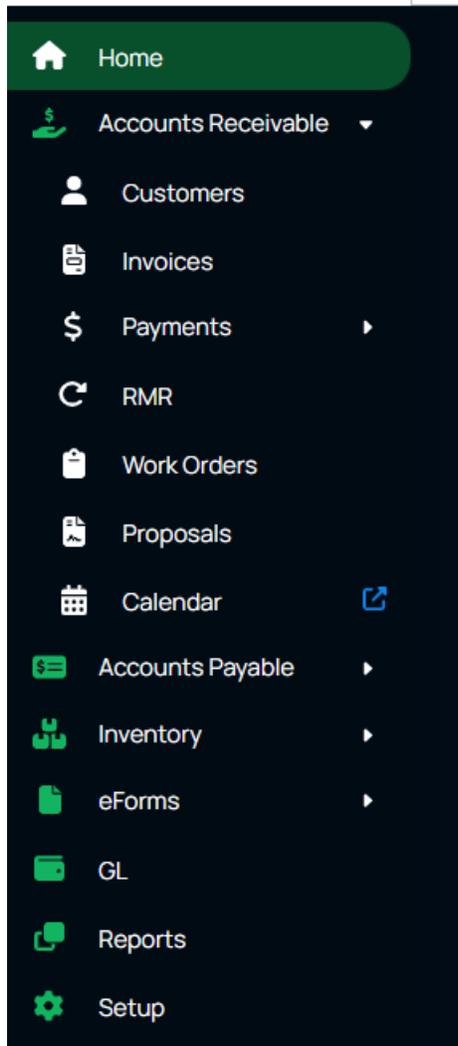


Hover over a module to see the submenu: (This example shows the Accounts Receivable submenu.)



Click a module to pin the submenu: (This example shows the Accounts Receivable submenu pinned.)

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Collapse the menu (this option is at the bottom of the menu) to see only the menu icons:



Click an icon to pin the submenu icons: (This example shows the Accounts Receivable submenu pinned.)



Charge First RMR Cycle Flag

There is a new field on work order RMR and proposal RMR called **Charge First Cycle**. By default, this is set to No. Change this to Yes to include recurring items associated with RMR in the work order or proposal and the RMR cycle start date will be moved once the cycle forwards.

Work Order RMR

Add Work Order RMR ✕

Item •	<input type="text"/>	Billing Cycle •	Annual
Roll Up Item	<input type="text"/>	Recurring Reason •	<input type="text"/>
Description	<input type="text"/>	Category •	<input type="text"/>
	0/500	P.O. Number	<input type="text"/>
Invoice In Arrears	<input type="radio"/> NO ?	Discount Item	<input type="text"/> ?
Charge First Cycle	<input type="radio"/> NO ?	Monthly Amount •	\$0.00
Do Not Prorate	<input type="radio"/> NO ?	Cycle Amount	\$0.00
Use Cycle Amount	<input type="radio"/> NO ?	Default Cost	\$0.00
Qty Based Billing	<input type="radio"/> NO ?		
Include Memo	<input type="radio"/> NO ?		
Memo	<input type="text"/>		
	0/500		
Activation Date •	5/25/2023		
RMR Cycle Start Date •	<input type="text"/>		
RMR Cycle End Date	month/day/year		
Last Invoice Date	<input type="text"/>		
Custom Date	<input type="text"/>		
Cancellation Date	<input type="text"/>		

Proposal RMR

Add Proposal RMR ✕

Item • <input type="text" value=""/> <small>Error: Item is required</small>	Billing Cycle • Annual
Roll Up Item <input type="text"/>	Recurring Reason • <input type="text"/>
Description <input type="text" value=""/> <small>0/500</small>	Category • <input type="text"/>
Invoice In Arrears <input type="radio"/> NO ?	P.O. Number <input type="text"/>
Charge First Cycle <input type="radio"/> NO ?	Deferred Posting Day • 1 ?
Do Not Prorate <input type="radio"/> NO ?	Discount Item <input type="text"/> ?
Use Cycle Amount <input type="radio"/> NO ?	Monthly Amount • \$0.00
Qty Based Billing <input type="radio"/> NO ?	Cycle Amount \$0.00
Include Memo <input type="radio"/> NO ?	Default Cost \$0.00
Memo <input type="text" value=""/> <small>0/500</small>	
Activation Date • 5/25/2023 <input type="text"/>	
RMR Cycle Start Date • <input type="text"/>	
RMR Cycle End Date month/day/year <input type="text"/>	
Last Invoice Date <input type="text"/>	
Custom Date <input type="text"/>	
Cancellation Date <input type="text"/>	

Application Corrections

Resolved Issues
<p>Service Labor Should not be billed as negative</p> <p>We resolved an issue with Billing Increments (rounding to 15 minutes) found when a technician was on a customer site for less than 15 minutes that was showing a negative charge for the service labor on the customer invoice.</p>
<p>Issues with Proposals- Discount did not calculate correctly on sales price</p> <p>We resolved an issue on proposals where the discount did not calculate correctly on the sales price.</p>
<p>Deliver Button on Invoice doesn't do anything</p> <p>We fixed an error seen when users clicked the Deliver button on an invoice that had a delivery method set to print.</p>
<p>Duplicate check number error when using ACH</p> <p>We resolved a message that users were receiving about duplicate check numbers when making a payment from the Pay section of a bill.</p>