Managely Release Notes

July 2023

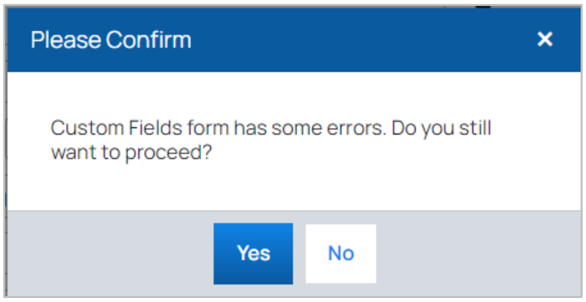
Version 5.3.24

Contents

Enhancements

(Enterprise) Alert If Required Custom Fields Are Not Complete

If a custom field has been set as required and added to an entity (Customer, Customer Site, Customer System, Proposal, RMR, Work Order), when that custom field is left blank on its entity, there is a message alerting that the required custom field has not been completed:

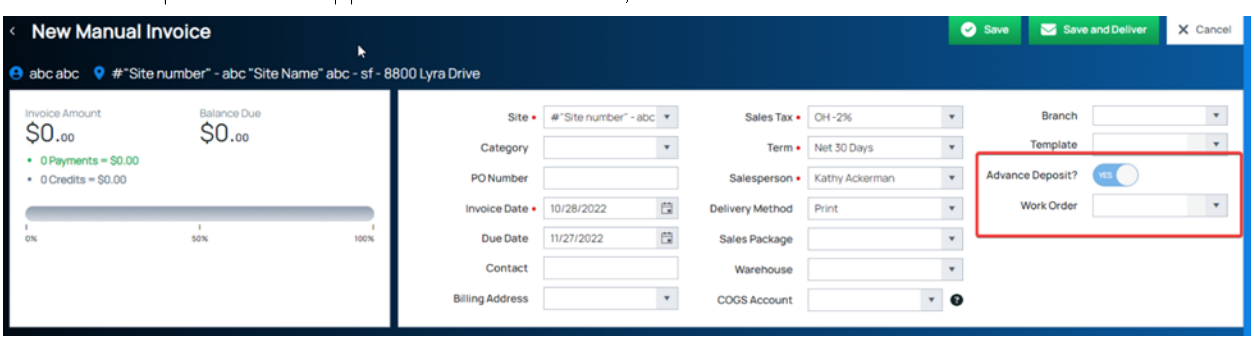


Click No to postpone the saving and continue working in edit mode. The Custom Fields tab will be loaded (if it was not already on display while saving) showing the fields with errors.

Click Yes to save even if the required custom fields have no values.

(Enterprise) Invoice Advance Deposits

For manual invoices, there is a new field called Advance Deposit? If this is set to Yes, another field called Work Order appears to select an existing work order for the customer for the advance deposit. (This makes the deposit invoice appear on the work order.)



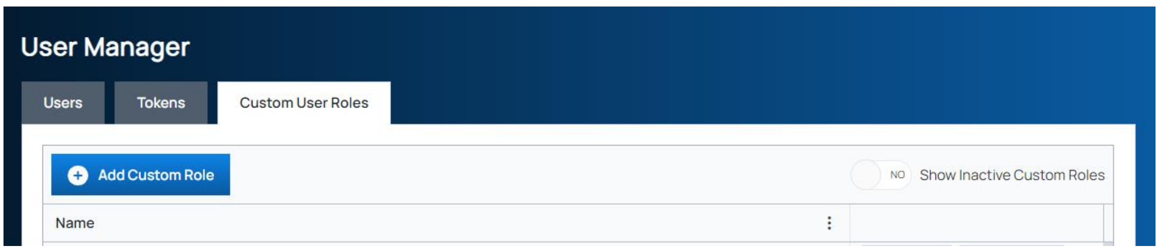
When selecting the Advance Deposit? option, Managely automatically adds the deposit item specified in setup to the invoice and removes the ability to add or remove further items and parts to the invoice.

(Pro) Custom User Roles

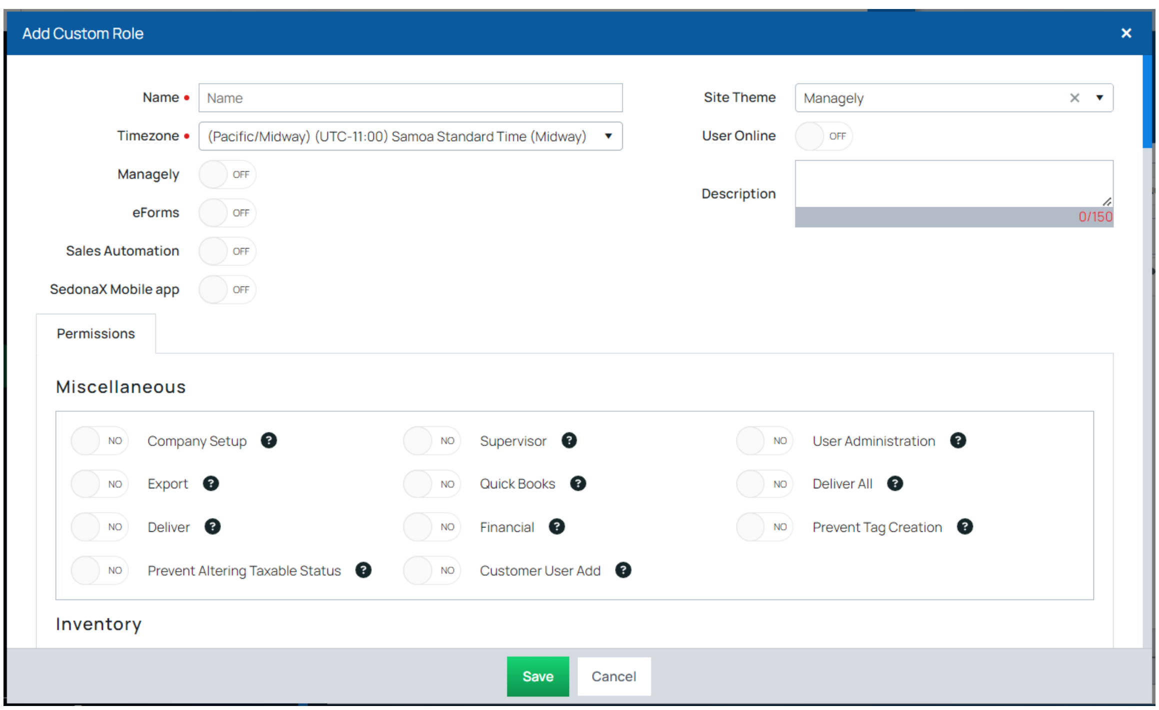
Custom user roles are a way to define a role and assign permissions to it for users who have similar permissions in Managely. These custom roles appear in the **User Role** drop down list when creating or editing users.

How to Create a Custom Role

1. Open the User Manager page. (Setup > Company > User Manager)
2. Click the Custom User Roles tab.



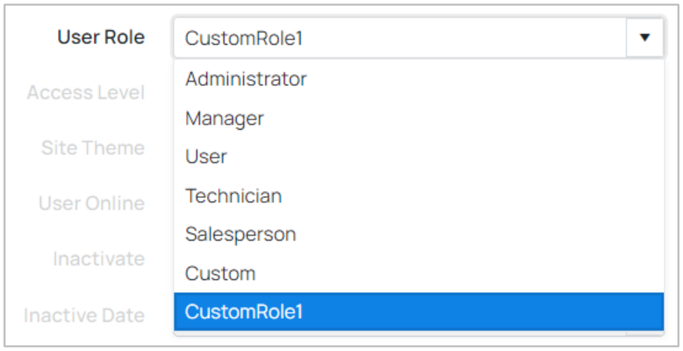
3. Click **+ Add Custom Role**. This opens the Add Custom Role form.



4. Type a **Name** for the role and select a **Timezone**. (These are required.)
5. Select packages (any combination of Managely, eForms, Sales Automation, and SedonaX Mobile app) and permissions for the role.
6. Click **Save**.

How to Assign a Custom Role

1. Open the User Manager page. (Setup > Company > User Manager)
2. Click the Users tab.
3. Create a new user or edit an existing one.
4. To assign the custom role, click in the **User Role** field.
5. In the list of roles, click the custom role that you created.



6. Click **Save**.

(Pro) Progress Invoicing when a Work Order Includes a Deposit

If a work order includes one or more deposits, users can apply them during progress invoicing.

When completing a work order that contains a deposit, there is a confirmation message: "Would you like to apply any of the deposits associated with the work order to the invoice?"

If the selected deposits applied to the progress invoice cause the invoice to go negative, then Managely incrementally selects the deposits and adjusts the total of the invoice until it is zero. Any remaining selected deposits are removed from the invoice, but are available for the next progress invoice.

For example:

There is a work order with items, parts, and tax totaling $100.

There are three deposits selected to apply, each for $60.

The invoice would total $-80 before adjusting deposits to apply to the invoice.

The first deposit will be applied in full, the second deposit will have $40 applied, and the third deposit will not appear on the invoice.

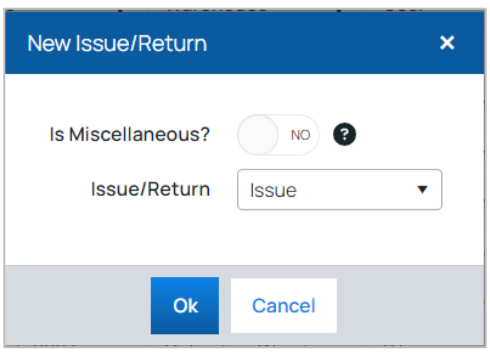
When users create the next progress invoice, the first deposit will not be available to choose as it has been fully applied, the second deposit will show $20 available to apply, and the third deposit will show the full $60.

Users cannot select any deposits that have already been fully applied to an invoice. Users cannot complete a work order if the selected deposits cause the final invoice to go negative.

(Pro) Negative Quantity Control for Work Order Issues

The **Negative Quantity Control** field on the Preferences page Inventory tab (Setup > Company > Preferences) now applies to parts issued to work orders. The choice in this field determines what happens when a user initiates an action on a work order that pulls parts from a warehouse and causes the quantity of that part in the warehouse to drop below zero. There are two ways users can issue parts to a work order:

1. On the Parts tab using the Issue/Return tab, or
2. On Inventory > Issues & Returns when creating a non-miscellaneous issues, which means the **Is Miscellaneous** switch is set to No, so users must select a work order for the issue.



The **Negative Quantity Control** field on the Preferences page Inventory tab has these choices:

Allow: This allows users to process transactions without any warning messages about negative quantities.

Allow With Warning: This gives users a popup message telling users that if they continue, the parts will have a negative quantity in the warehouse and asks if they wish to continue. They can choose yes to complete the transaction, or they can choose no to stop the transaction.

Do Not Allow: This stops the transaction and gives users a popup message telling them that the part would have a negative quantity and asks them to adjust part quantities and try the transaction again.

Application Corrections

Resolved Issues
35161-Invoicing Master Customers- Email is defaulting to customer email rather than checking if the Bill to email address is different We resolved an issue with invoicing master customers where the default email address was not using the bill to email address.
35404-Parts Error: Error trying to edit work order by adding parts We fixed an error found when editing a work order and adding parts.
35885-Work Order 1856 Parts We resolved an issue with some work orders not correctly showing the list of parts.