Managely Release Notes

Month 2023

Version 5.3.28

Contents

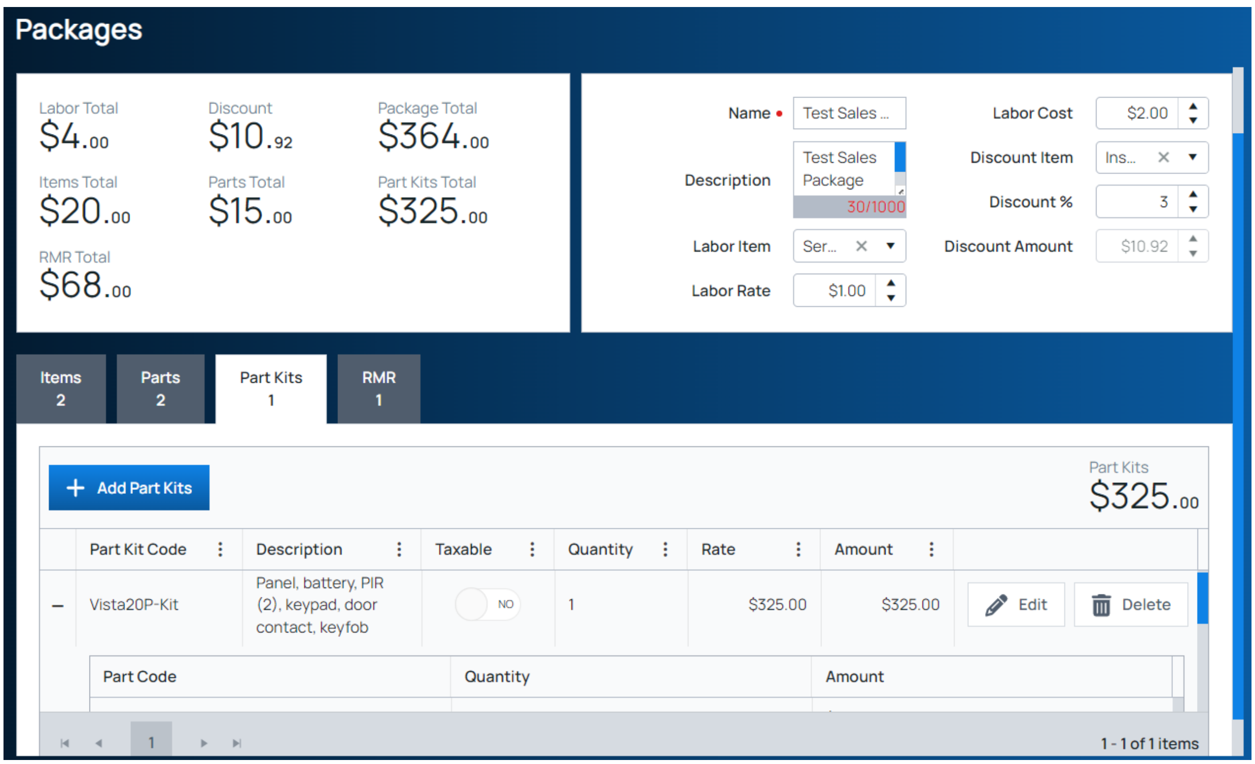
Enhancements

(Enterprise) Sales Packages Part Kits

On the Packages page (Setup > Proposals > Packages), we added a Part Kits tab. Users can edit the package and add part kits to the package by clicking the +Add Part Kits button. This shows a list of part kits that users can choose to add.

Users can delete part kits from a package and edit the quantity of existing part kits on a package.

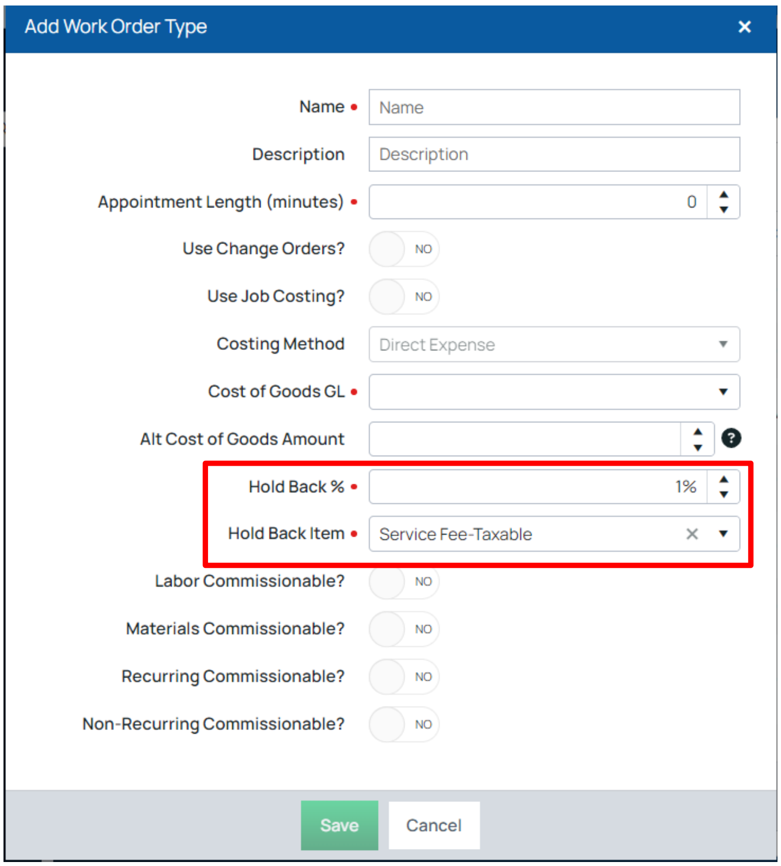
Expanding the part kit shows the parts that are in the kit.



(Enterprise) Hold Back Added to Work Order Type Setup

We added two fields to the Add Work Order Type form (Setup > Operations > Work Order Types):

- Hold Back % — This defaults to zero; 1 equals 100%.
- Hold Back Item — This is hidden until the Hold Back % is greater than zero.



If generating a progress invoice or an invoice before completing a work order that is using a work order type with a hold back percentage, the hold back item is added automatically. After completing the work order, users will need to generate an invoice to collect the hold back amounts that were withheld from the invoices generated before completing the work order.

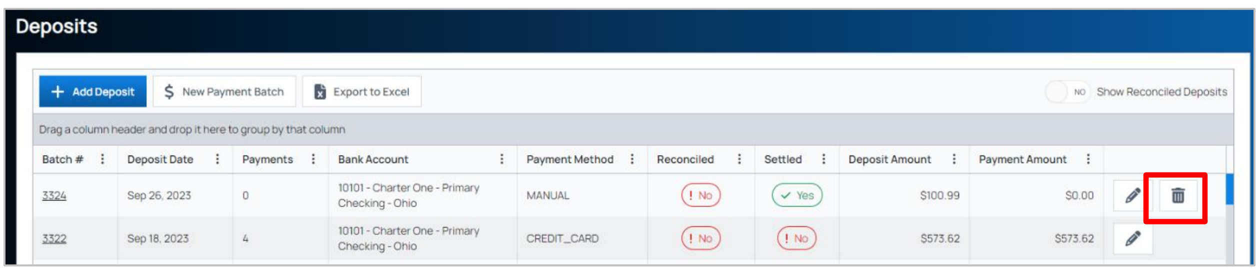
For example: There is a work order type using a Hold Back percentage of 10%. Generate an invoice for the work order with total charges of $10,500 (before tax). A hold back item is added automatically with a total of $1,050 (which is 10% of the $10,500 before tax work order total) as a negative value to the invoice. When the work order is marked as complete, generate an invoice to collect all the hold back amounts that were withheld from previous invoices. To do this, add the same hold back item that was used on previous invoices to a new invoice for the sum of all prior amounts attached to invoices, but this time as a positive amount. In this example, add the hold back item to a new invoice for a total of $1,050.

Deleting Deposits

We added the ability to delete deposits on the Deposits page (Accounts Receivable > Payments > Deposits) under both conditions:

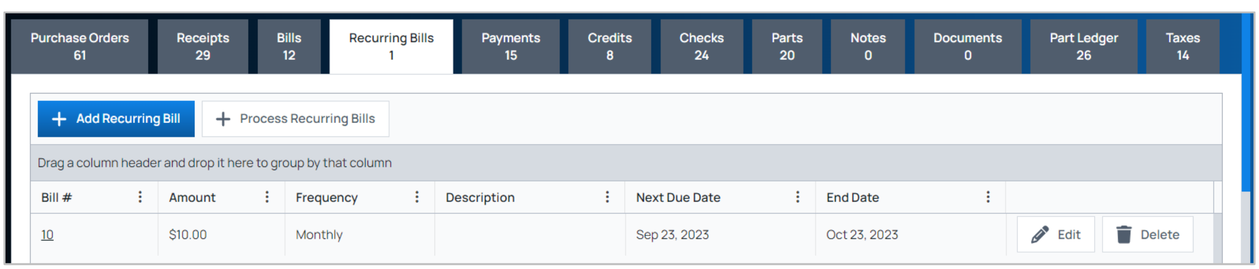
1. Deposit is a manual deposit (cash/check payments)
2. Deposit contains no payments

In the grid, these rows have a delete button:

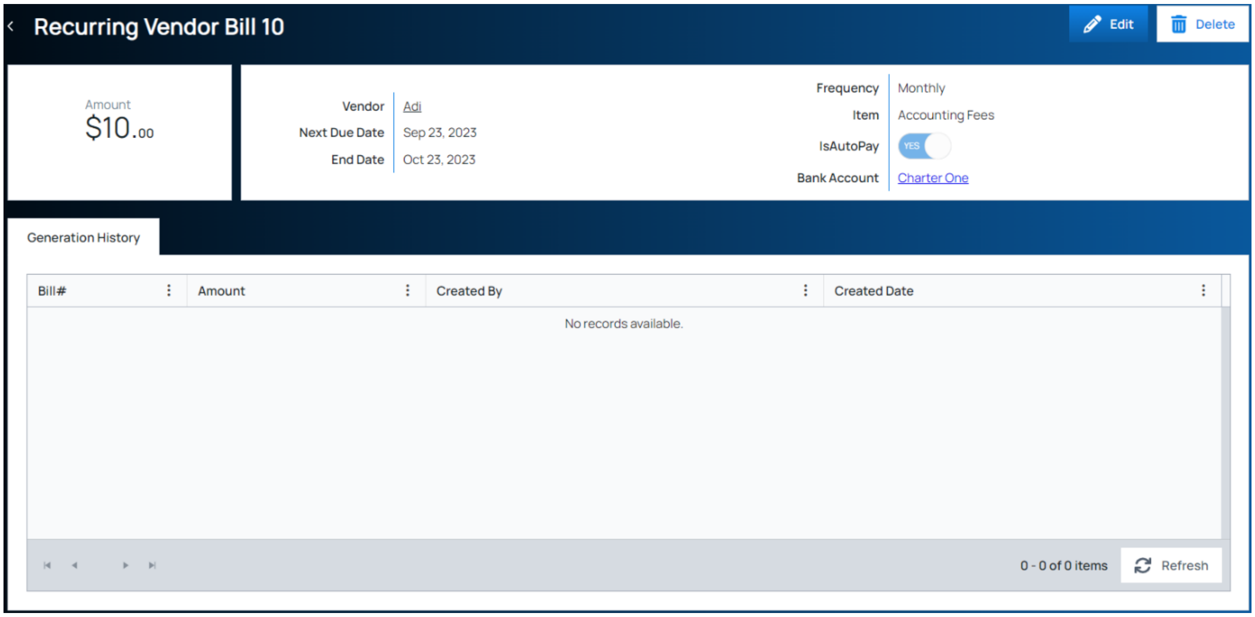


Recurring Bill Details Page

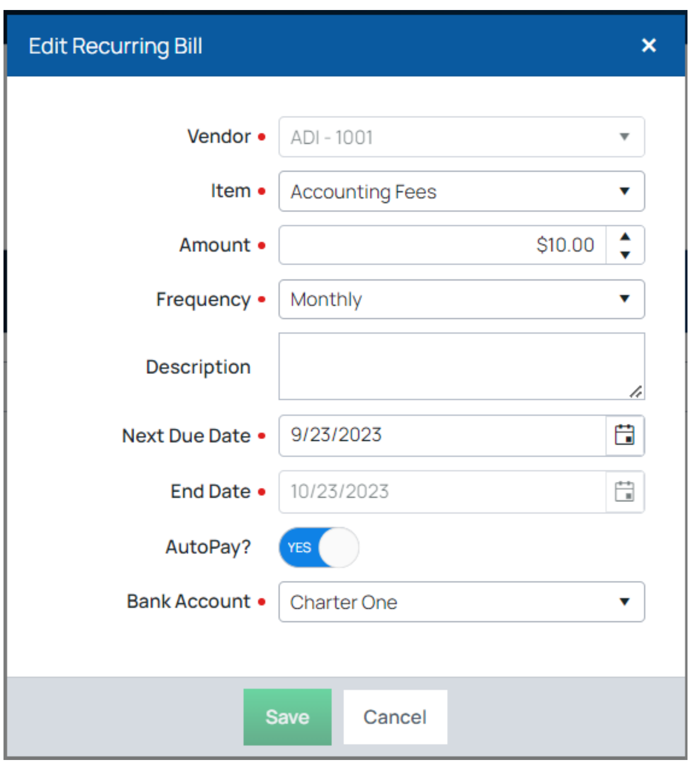
We added a details page for recurring bills. To see this, browse to Accounts Payable > Vendor > open a vendor > Recurring Bills tab > click a Bill # link in the grid.



This shows the details for the recurring bill and the generation history (if any) in the grid.



From here, users can edit the recurring bill:



Proposal Items Estimated Costs

The total cost associated with each item on a proposal is used in the Other cost bucket in the Estimated column of the job costing on work orders created from the proposal.

For example: A proposal has two items on it:

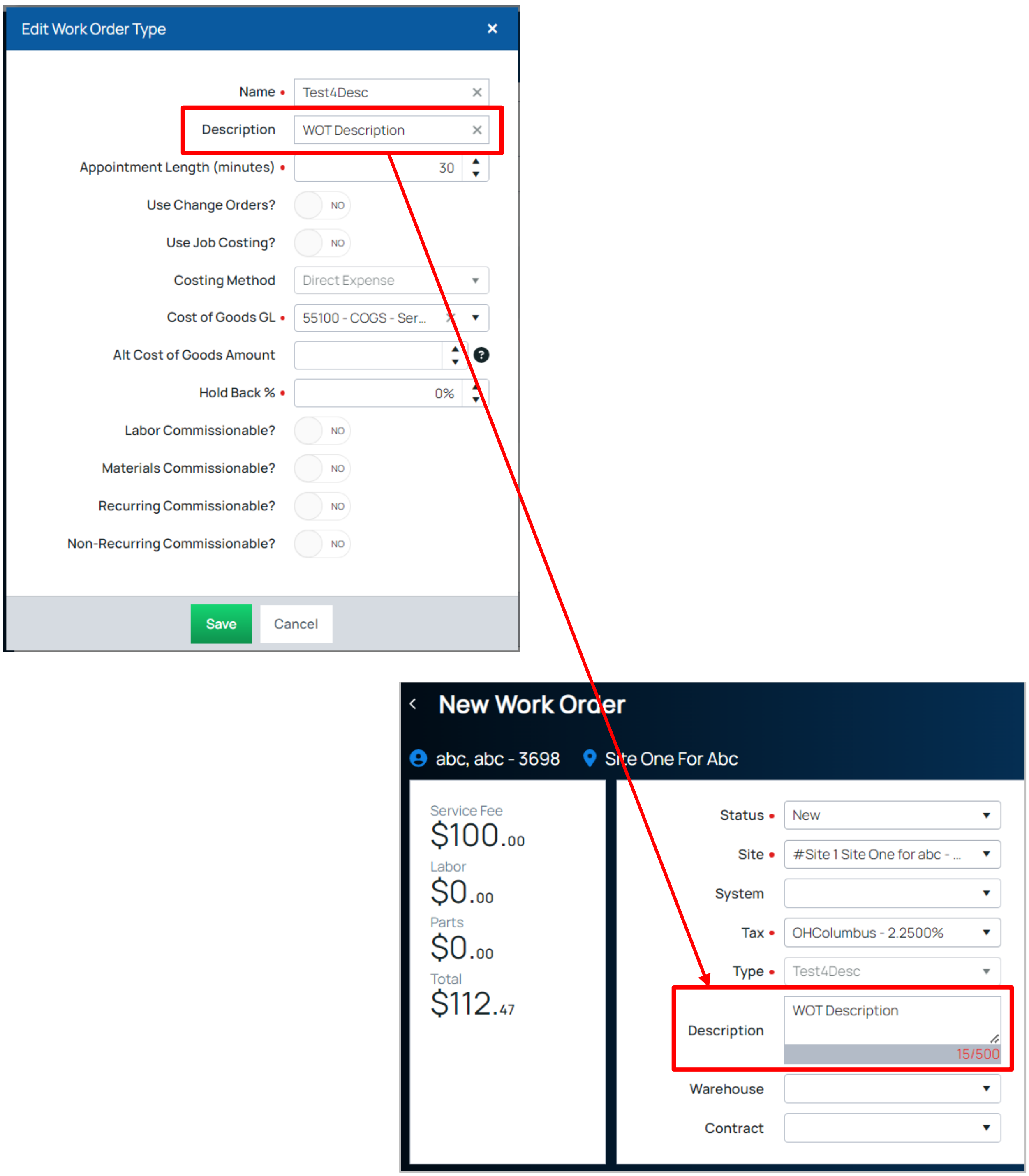
Item 1: QTY of 2, Cost of $5.00

Item 2: QTY of 1, Cost of $10

When the proposal is converted to a work order, the total cost ($20) is added to the Other costs bucket in the Estimated column on the work order’s Costing tab.

Default Work Order Description from Work Order Type Description

The description on the work order type becomes the default description on a work order using that work order type.



Application Corrections

Resolved Issues
BI Dashboard- Cannot toggle off reports- receiving error message We fixed an error with trying to restrict access to BI dashboard reports.
Can't select check boxes that are in a template from the customer side (no authorization the assign to recipient) We corrected an issue with adding checkboxes to an eForm template but not having an option on the right side to allow anyone to edit that checkbox.
eForms: Unable to check-mark the checkboxes in the eForms template. We resolved an issue with eForms where recipients could not select checkboxes that had been added.
Error at system level We corrected an error found when editing a system and then saving it.
Erroneous Work Order Lock Warning Message We resolved an error (Work order is currently locked) displayed multiple times when completing a work order.
Managely - cannot refund CC payment We resolved an issue with Managely being unable to refund a credit card payment.
ISSUE with proposals: Grouping, Moving a line item and duplicated parts We resolved an issue with parts on proposals so that now users can change the order of parts and add duplicate parts.
Searching Closed Work Orders We corrected an error and other issues with the search features for work orders so that users can apply all available search filters.
Printed WO shows Description in Control Unit instead of Part Number We changed printed work orders to show the part number in the Control Unit field instead of the part descriptions.

Resolved Issues
Work Order locked when no one else was in it We resolved an issue with a work order being locked when only one user was accessing it.
Eforms are not displaying categories and they are not in alphabetical order The Templates dropdown list now sorts in alphabetical order by category.
Print display When printing invoices from work orders, parts now print in the same order as they are displayed on the screen.
Work Order - Additional Technicians We fixed an issue where Managely was creating two appointments for an additional technician added to a calendar appointment.
Trying to create work order from a proposal with an Enterprise license and the work order type has commissions turned on gives an Error. We resolved an error caused when creating a work order from a proposal when the work order type had commissions turned on.
Unable to close work orders We resolved an issue that was preventing some work orders from closing as expected and giving an error instead.
Completed Work Orders still showing in the open work order list We resolved an issue with work orders where some would have a completed status but remain on the open work order list.
Multiple clicks on save button results in multiple records being created We resolved an issue where clicking save caused multiple entries (specifically when saving a GL entry, clicking save multiple times created multiple entries).
Customer Balance field We fixed an issue with the Customer Balance field on templates that was causing it to display without the expected formatting.