



Managely Release Notes

October 2023

Version 5.3.29

MANAGELY™

Contents

Enhancements	2
Global 'Do Not Send \$0 Invoices' Default	2
(Enterprise) Proposals Part Kits	2
Add Amount Progress Invoicing Feature	4
Customer Payments Grid Update	5
Primary Statement Option Added to Billing Information	6
Application Corrections	7
Confirming Appointments	7
3 concerns regarding RMR cancelation, see steps	7
Managely 5.3.26.8 Costing from a proposal the estimated charges are wrong coming into a work order ..	7
Managely 5.3.26.8 Costs are not correct in a Work Order related to a Timesheet	7
Change orders can be created for closed/completed work orders	7
Late fees/ statements	7
Not using WIP accounts, wants to use COGS	7
All Day Appointment Next Day Issue	8
Adding a Branch Errors	8

Enhancements

Global 'Do Not Send \$0 Invoices' Default

We added a new default setting on the Setup > Company > System Defaults page called **Do Not Deliver \$0 Invoices**:

System Defaults

- Invoice Delivery • Print
- New Work Order Status • New
- CC/eChecks Funding Month • Current Month
- Show Late Fees on Invoice YES
- Auto Apply Payments/Credits NO
- Email RMR Payment Receipt YES
- Do not deliver \$0 Invoices** NO

When this is set to Yes, Managely will not deliver any zero-dollar invoices.

(Enterprise) Proposals Part Kits

We added a Part Kits tab to Proposals showing both the part kits and all associated parts underneath.

Part Kit Code	Description	Taxable	Sales Tax Code	Quantity	Rate	Amount
Vista20P-Kit	Panel, battery, PIR (2), keypad, door contact, keyfob	<input type="checkbox"/> NO		1	\$325.00	\$325.00

Part Code	Quantity	Amount
5800PIR	2	\$92.86
5816	1	\$46.43
5834	1	\$46.43
6160	1	\$46.43
IM-1270	1	\$46.43
Vista20P	1	\$46.42

If users change the sales package on the proposal, the part kits from the new sales package will be pulled in and any older part kits will be removed from the proposal. Doing this will give a confirmation message:

Are you sure you want to change the current Sales Package? All Items, Parts, Part Kits, or RMRs associated with the current Sales Package will be removed.

The Charges tab now includes the Part Kit parts.

Overview	Items 1	Parts 0	Part Kits 1	Charges 7	RMR 0	Notes 0	Documents 0	Complete	Custom Fields	eForms 1
Name		Description								
- Ungrouped										
Item/Part Code	Item/Part Description	Qty	Rate	Taxable	Sales Tax	Amount				
Down Payment	Down Payment	1	\$1,500.00	<input type="radio"/> NO	OHSTATETAX	\$1,500.00				
5800PIR		2	\$46.43	<input type="radio"/> NO	OHSTATETAX	\$92.86				
5816		1	\$46.43	<input type="radio"/> NO	OHSTATETAX	\$46.43				
5834		1	\$46.43	<input type="radio"/> NO	OHSTATETAX	\$46.43				
6160		1	\$46.43	<input type="radio"/> NO	OHSTATETAX	\$46.43				
IM-1270		1	\$46.43	<input type="radio"/> NO	OHSTATETAX	\$46.43				
Vista20P		1	\$46.42	<input type="radio"/> NO	OHSTATETAX	\$46.42				

The Overview tab now displays the part kit amounts and costs, which are also included in the parts cost.

Sales Price	
Items	\$1,500.00
Parts	\$0.00
Part Kits	\$325.00
Labor	\$0.00
Discount	\$0.00
Sales Price	\$1,825.00
Cost	
Items	\$500.00
Parts	\$334.35
Labor	\$0.00
Total Cost	\$834.35

Add Amount Progress Invoicing Feature

Previously, Managely supported progress invoicing based on a percentage of the total project cost. We have enhanced this to include the option of invoicing based on an amount. When invoicing an amount, Managely prevents users from entering an amount that would exceed the project's total value.

When users enter an invoice, they can choose to use a percentage or an amount (by default new invoices use percentage):

The screenshot shows the 'New Invoice' interface. At the top, there is a toggle for 'Use Percentage?' which is currently turned on (YES). Below the toggle is a 'Percentage' input field set to 0%. A red box highlights this section. Below the percentage field is a 'Change Orders' section with a table:

	Change Order	Amount
<input type="checkbox"/>	6	\$10.00

At the bottom of the form, there are two buttons: '+ Create' and 'X Cancel'.

New Invoice ✕

Use Percentage? NO
 Amount

Change Orders

	Change Order	Amount
<input type="checkbox"/>	6	\$10.00

1 - 1 of 1 items

+ Create
✕ Cancel

Customer Payments Grid Update

On the customer's Payments tab, we expanded the payments to show the invoices that each payment was applied to. This shows the invoice number, amount applied, and a link to the invoice.

Invoices	Credits	Sites/Systems	Contracts	RMR	Work Orders	Bill To Information	Proposals	Payments	CC/eCheck	Notes	Contacts	Docume
20	6	3/4	0	2	0	1	1	5	10	0	0	3
✓ Issue Refund Check												
Payment #	Payment	Deposit	Check Num	Payment Met	Amount	Unapplied	Settled					
+ 161	Oct 4, 2023	178	80	Check	(\$100.00)	(\$100.00)	<input type="checkbox"/> NO	Receipt				
- 15	Sep 23, 2021	11	9999	Check	\$50.00	\$15.00	<input type="checkbox"/> NO	Receipt \$ Apply				
					Amount							
					Invoice - 10062	\$5.00						
					Invoice - 10198	\$15.00						
					Invoice - 10062	\$10.00						
					Invoice - 10198	\$5.00						
+ 16	Sep 13, 2021	12	9999	Check	\$100.00	\$100.00	<input type="checkbox"/> NO	Receipt \$ Apply				
1 - 5 of 5 items Refresh												

Primary Statement Option Added to Billing Information

On the customer Bill-To Information tab, we added the Primary Statement field to the Add Billing Information and Edit Billing Information forms:

The screenshot shows a web form titled "Add Billing Information" with a close button (X) in the top right corner. The form contains several fields and options:

- Primary Bill To:** A toggle switch currently set to "NO".
- Residential/Commercial:** Radio buttons for "Residential" (selected) and "Commercial".
- Full Name:** Two input fields for "First Name" and "Last Name".
- Address:** Two input fields for "Address 1" and "Address 2".
- City:** An input field followed by a dropdown menu.
- Zip Code:** An input field followed by a dropdown menu for "Plus 4".
- Phone:** An input field with a format mask "() - - - -" and an "Ext" field.
- Cell Phone:** An input field with a format mask "() - - - -".
- Email:** An input field labeled "Email".
- Primary RMR:** A toggle switch currently set to "NO".
- Primary Work Order:** A toggle switch currently set to "NO".
- Primary Manual:** A toggle switch currently set to "NO".
- Primary Statement:** A toggle switch currently set to "NO", which is highlighted with a red rectangular box.

At the bottom of the form, there are two buttons: "Save" (green) and "Cancel" (white).

This allows statements to go to the address on the account.

In addition, we changed the formatting of the phone numbers shown on the statements.

Application Corrections

Resolved Issues
<p>Confirming Appointments</p> <p>We corrected an issue that was taking users to the login page when trying to confirm appointments.</p>
<p>3 concerns regarding RMR cancellation, see steps</p> <p>We resolved three issues related to RMR cancellation:</p> <ol style="list-style-type: none">1. When editing RMR, the bill to was blank instead of defaulting in cases where there was only one.2. When entering the current date as an RMR Cancellation date, there was a popup informing users they had entered a future date.3. The popup message showed the wrong cancellation date (even though it was correctly using the entered cancellation date). <p>We also changed the popup message:</p> <p>You are canceling this RMR today, this RMR item will be invoiced through the cancellation date of [the entered cancellation date]. Are you sure this is what you would like to do?</p>
<p>Managely 5.3.26.8 Costing from a proposal the estimated charges are wrong coming into a work order</p> <p>We fixed this so a labor Item or discount Item is included in the job Costing tab Estimated Amount calculation.</p>
<p>Managely 5.3.26.8 Costs are not correct in a Work Order related to a Timesheet</p> <p>We fixed an issue with the Timesheets tab not displaying the Total Labor Cost. Also, now work order appointments will use the burdened labor rate from the selected technician.</p>
<p>Change orders can be created for closed/completed work orders</p> <p>The Create Change Order button will no longer appear on completed work orders.</p>
<p>Late fees/ statements</p> <p>We resolved an issue where users would need to generate statements twice to get the late fees to appear on the statements as expected.</p>
<p>Not using WIP accounts, wants to use COGS</p> <p>The Labor WIP dropdown will no longer be shown when a Work Order Type is not using WIP.</p>

Resolved Issues

All Day Appointment Next Day Issue

Selecting All Day Event when creating a calendar appointment will automatically set the start time to 12:00 AM and the End time to 11:59 PM of the same day.

Adding a Branch Errors

We resolved an error (Unable to save changes. Branch has just been updated by another user. Click Save again to overwrite the changes.) that was displaying multiple times after adding a branch.