Managely Release Notes

October 2023

Version 5.3.29

Contents

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**:

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.

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.

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):

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.

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:

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
Confirming Appointments We corrected an issue that was taking users to the login page when trying to confirm appointments.
3 concerns regarding RMR cancelation, see steps We resolved three issues related to RMR cancellation: 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). We also changed the popup message: 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?
Managely 5.3.26.8 Costing from a proposal the estimated charges are wrong coming into a work order We fixed this so a labor Item or discount Item is included in the job Costing tab Estimated Amount calculation.
Managely 5.3.26.8 Costs are not correct in a Work Order related to a Timesheet 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.
Change orders can be created for closed/completed work orders The Create Change Order button will no longer appear on completed work orders.
Late fees/ statements We resolved an issue where users would need to generate statements twice to get the late fees to appear on the statements as expected.
Not using WIP accounts, wants to use COGS The Labor WIP dropdown will no longer be shown when a Work Order Type is not using WIP.

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.