Managely Release Notes

November 2023

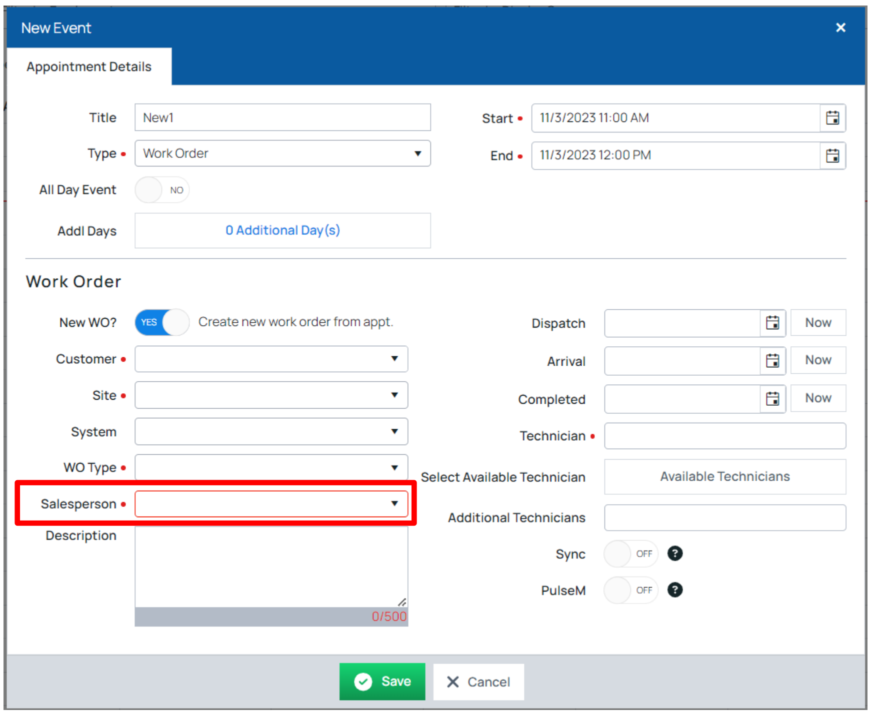
Version 5.3.30

Contents

Enhancements

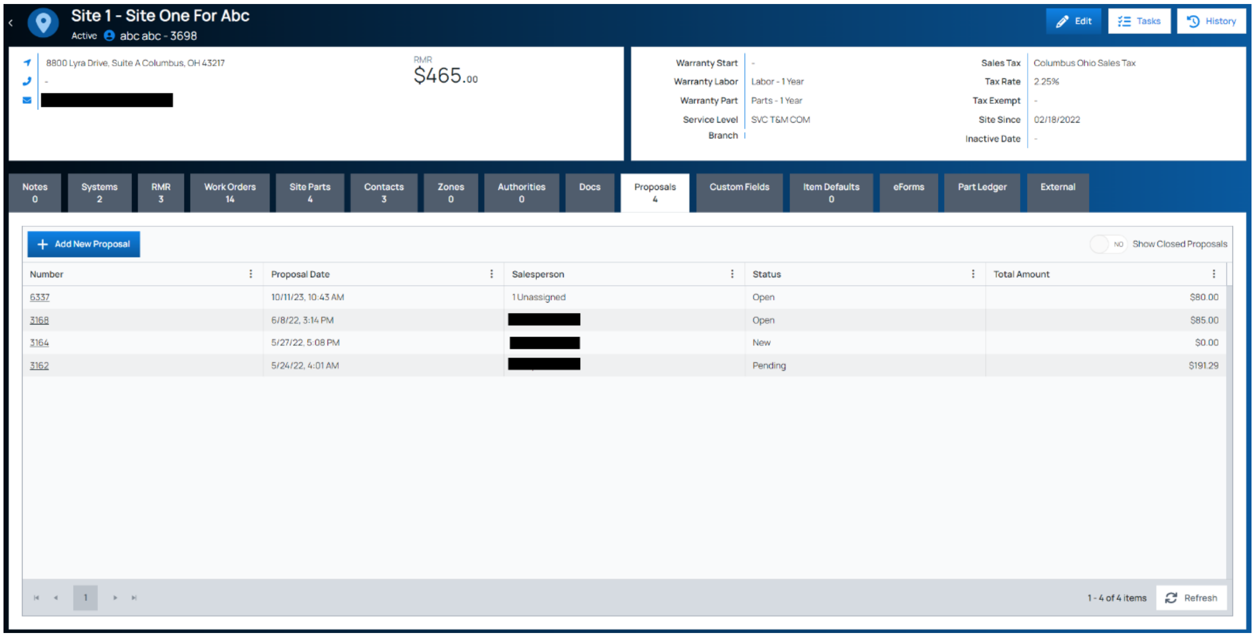
Calendar Work Order Appointment Salesperson Dropdown Filtering

On the calendar, when creating a new appointment and a new work order, the Salesperson dropdown is visible. Users can now filter this list by first name and last name, by typing a salesperson's first name.



Customer Site Added Proposal Tab

On the customer site page, we added a Proposal tab. This shows any proposals associated with the site. Users can add new proposals to the site. The proposal numbers are hyperlinks to open the proposal.

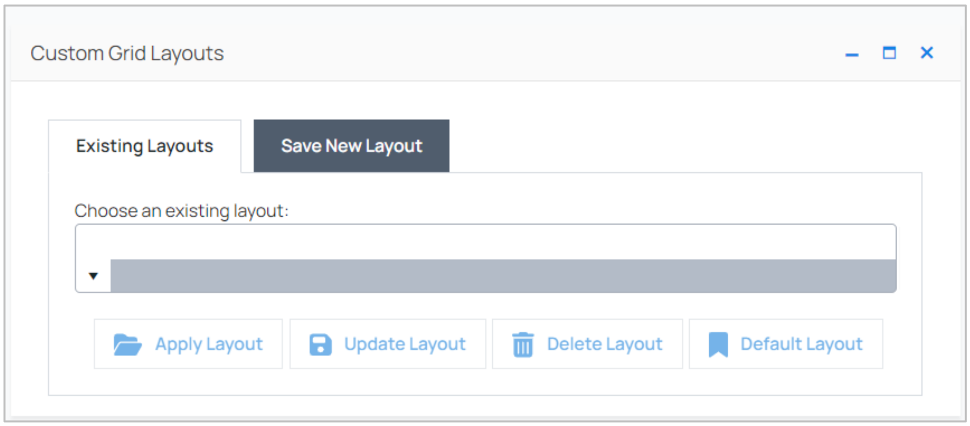


Part Kits Transfer from Proposals to Work Orders and Invoices

When generating an invoice or a work order from a proposal, any associated part kits on the proposal transfer to the invoice or a work order.

(Enterprise) Collections Page Added Custom Grid Layout Button

On the Collections page (Accounts Receivable > Collections), we added a Custom Grid Layout button. Use this to save, apply, update, and delete layouts.



Invoice Batch Download Enhancement

We changed the print batch download. This will check if the batch has already been generated and if it is up to date (meaning no invoices have been modified since last generation), then it will get the batch and download it. If the batch has changed, it will generate a new batch and download it.

Work Order Tasks Show Code and Description

When adding tasks to work orders (Accounts Receivable > Work Orders > Work Order > Tasks tab > Add Work Order Task), the Work Order Task dropdown list was showing only the task code, which was defined when the task was created (Setup > Operations > Work Order Tasks). We changed this list to show the task code and the description, so it is easier to find the appropriate task.

Application Corrections

Late Fee Payment w/ Payment Batch Applying Issues

We made these changes:

1. Within the payments detail page, the Applied payments tab shows Added a Late Fee label to the invoice if any.
2. Information is loaded correctly in the Late Fee Invoice Detail Payments tab.

Updating Primary Bill To Address Doesn't Update Customer Address

We changed the program that was updating the address of the customer on adding bill to info.

Existing Contacts

Users found when in sites and systems they could not choose an existing contact from the main account level. We made the following changes to resolve this:

- Added site/system contacts to the Customer Contacts tab.
- Updated the site/system contact count in their respective tabs.
- Filtered site/system existing contacts to only display contacts that were not already added to their respective contact list.
- When updating a site/system contact from outside of where it was created (for example, updating a site contact from the system/customer contact list after it was added to the system/customer contact list using "Add Existing Contacts"), the update process updates the original contact (the site contact)

WIP Accounts- not wanted; want to use COGS

We added COGS accounts to the WIP Account dropdown in Setup > Operations > Add Expense Type so users can choose cost of goods sold accounts.

Cannot submit vendor partial payment

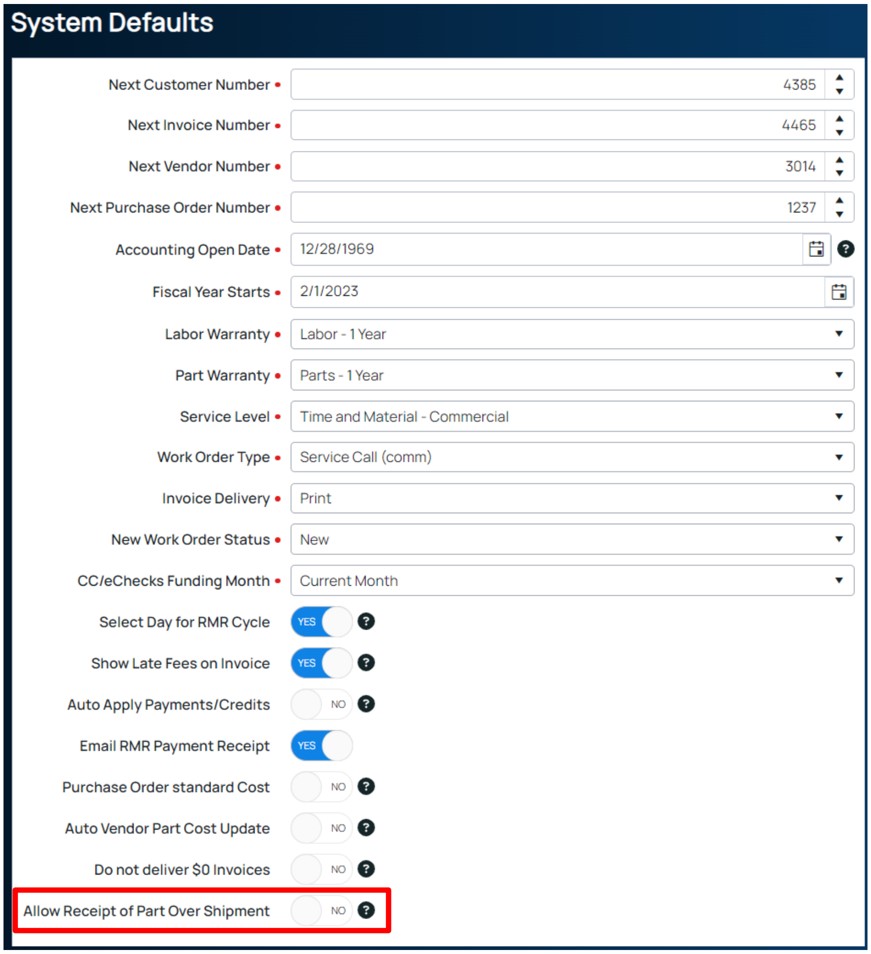
We fixed calculations while updating the row for the applied amount.

Sales Tax Set Up- Sales Tax Breakout for Multiple Tax Jurisdictions

We resolved this to allow and show the sales tax breakout for multiple tax jurisdictions.

Managely allows you to over receive parts on POs

We added a new field to Setup > Company > System Defaults to control the over receiving of parts in a receipt with an associated purchase order.



Adding Notes on the customer notes tab indicates they saved, but they do not save

We made changes to the form for adding notes to populate the Access level dropdown based on the access level of the user who is logged to make the notes save as expected.

When scheduling workorders, you cannot see the customer name or information

We fixed the columns widths so that the name and information do not disappear when window is resized.

I cannot select a Purchase Price Variance Account in Preferences

We updated the filter to filter by current asset.