



Managely Release Notes

December 2023

Version 5.3.31

MANAGELY™

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Enhancements

(Pro) Direct Expense Purchase Order Work Order Specification at Part/Item Level

We added edit buttons to the grid rows of items and parts. To see these edit the purchase order:

Item Code	Item Description	Branch	Work Order	Quantity	Rate	Expense Type	Amount	Received
1234	TestItem			1	\$10.00		\$10.00	2

For purchase orders, we added the ability to assign work orders to items and parts. We also added the customer display name to the work order number associated with the purchase order. To see this, edit row on the Items tab or Parts tab:

Edit PO Item

Item Code: 1234

Item Description: TestItem

Quantity: 1

Rate: 10.00

Amount: \$10.00

Received: 0

Branch: [dropdown]

Work Order: Search: work order id - customer name [dropdown]

Expense Type: Please Select

OK Cancel

Parts and items on receipts and bills now show the work order assigned to them in the purchase order.

Receipt - #3183

Total: \$10,264.00 | Remaining: \$0.00
 Items Total: \$0.00 | Parts Total: \$10,264.00

Vendor: Ace Hardware - 1236 | Direct Expense: NO
 Purchase Order: | Warehouse: Columbus Warehouse
 Category: General & Administrative | Receipt Date: 1/6/2023
 Ref. Number: RefNumber | Branch: Ohio

Included	Part Code	Description	Branch	Quantity	Rate	Work Order	Amount	Kit	Special Order?
<input checked="" type="checkbox"/>	01PART	Test Part Zero One		50	\$19.99		\$999.50		NO

Managely to SedonaOffice Feature Parity – Search Function

The global search function now includes “All”, which can search for terminated customers:

All Search: #

- All
- Customers
- Sites
- Systems
- Invoices
- Credits
- Payments

Stages integration – External Link field: this field needs a search feature, and the ability to search by Xmit#

On a site, on the External tab, when adding a link, the External Site field is searchable, to make it easier to find a site if there are many to choose from.

External Reference - Link Data

Connection: Stages

Managely Integration Entities

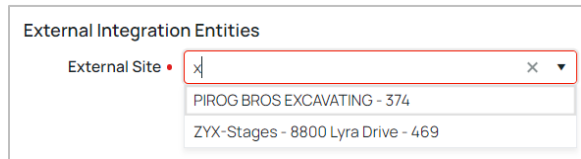
- XYZ-Stages Site 2 - 8800 Lyra Drive, Columbus
- Burglar Alarm - Site 2 Sys 1

External Integration Entities

External Site: Search

Save | Cancel

Typing a letter in this field shows sites that contain that letter.



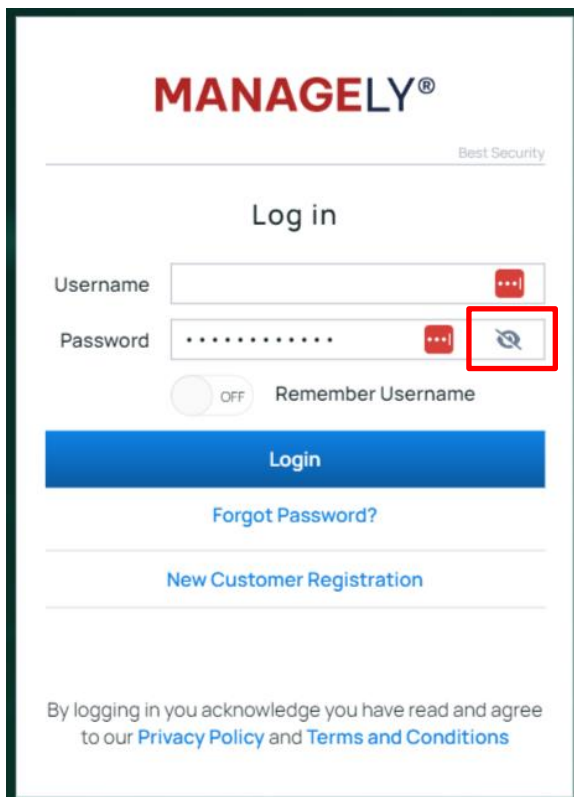
External Integration Entities

External Site • x

- PIROG BROS EXCAVATING - 374
- ZYX-Stages - 8800 Lyra Drive - 469

Added an option to view the password while typing

We added an option for users to view the password when logging into Managely.



MANAGELY[®]

Best Security

Log in

Username

Password

Remember Username

[Login](#)

[Forgot Password?](#)

[New Customer Registration](#)

By logging in you acknowledge you have read and agree to our [Privacy Policy](#) and [Terms and Conditions](#)

Application Corrections

Unable to add part to reopened ticket

We resolved an issue that was preventing users from adding parts to reopened work orders. With this we also fixed an issue with warehouse part allocations where the allocation was not displaying the correct amount of reserved parts in each warehouse.

Completed Work Orders still showing in the open work order list

We corrected an issue where completed work orders were showing in the open work order list.

Display issue when running recurring for a past date

When running past date RMR, the date at the top no longer resets to today's date.

Resend Invoices that were errantly marked Delivered

We fixed an issue where the system was marking all invoices as delivered instead of only the selected ones. Now only invoices/credits in the non-delivered grid will be marked as delivered.

Physical Inventory Rate column needs to be renamed Cost to avoid confusion

On the Physical Inventory Count page, we changed the title of a column from Rate to Cost.

Incorrect time Zone causing a customer payment to appear as overdue

We discovered the date was being converted to local time, so it is now being converted back to UTC time.

Work Order invoice error

We changed the error message so that it clearly states the problem, which in this case the master customer had no email, so that users can see and correct the source of the problem.

Also, we corrected the error messages for "Invoice Number Check" and "Accounting Period Lock".

Invoice/Credit Uploader Error

Users received an error when attempting to upload the invoice/credit file. We changed the process to ignore the example data tab and legend tab while uploading.

Fixed but not Fixed - Duplicated parts when utilizing parts uploader

When doing an upload, users were getting an error that parts already exist. To fix this, we added a validation for a blank value of taxable and update the value to false if it has no value. Also, if the panel is blank, then it will be considered as false.

Invoices not generating after closing work order (with pricing changing in the closed work order)

There was an issue with invoices showing 0.00 that was caused by its work order having a labor amount from appointments but not using timesheets, so no timesheets were generated, and the system erroneously zeroed the total labor amount.

Now in the case where timesheets are not generated, the invoice will use the appointments total labor amount, and use that to determine the invoice total.

Saved Custom Grid layouts do not allow selecting dates

We fixed a filter issue found when saving a custom grid with dates.

Managely does not allow to set a vendor to inactive (SO parity)

Vendors can now be made inactive and deleted.

GL Entry Date wrong when Invoice date is in future

The GL entry date can now use an invoice date in the future.

SyncGL Job duplicating Accounts Receivable

We fixed the SyncGL job that was adding all existing detail values to the new details.

Cannot Complete Workorders With Parts

We added a check to see if Inventory was enabled to prevent code from running that needs to have inventory enabled.

RMR invoices are sent twice to the customers

We corrected this so that on the Setup > Utilities > Automation page, the switches for **Invoice/Credit Delivery** and **RMR Invoice Delivery** cannot both be On. If one is on, the other automatically switches off.

