Managely Release Notes

March 2024

Version 5.3.35

Contents

Enhancements

Added the Branch Columns to Grids

We added the Branch column to the following grids:

- Customers
- Sites
- Invoices
- Credits
- Invoices/Credits Not Delivered
- Vendors
- Purchase Orders
- Receipts
- Bills
- Credits (Vendor Side)

Removed profile photo uploads for customer users

We have hidden the feature to upload a profile photo for customer users. Only employees can have profile photos.

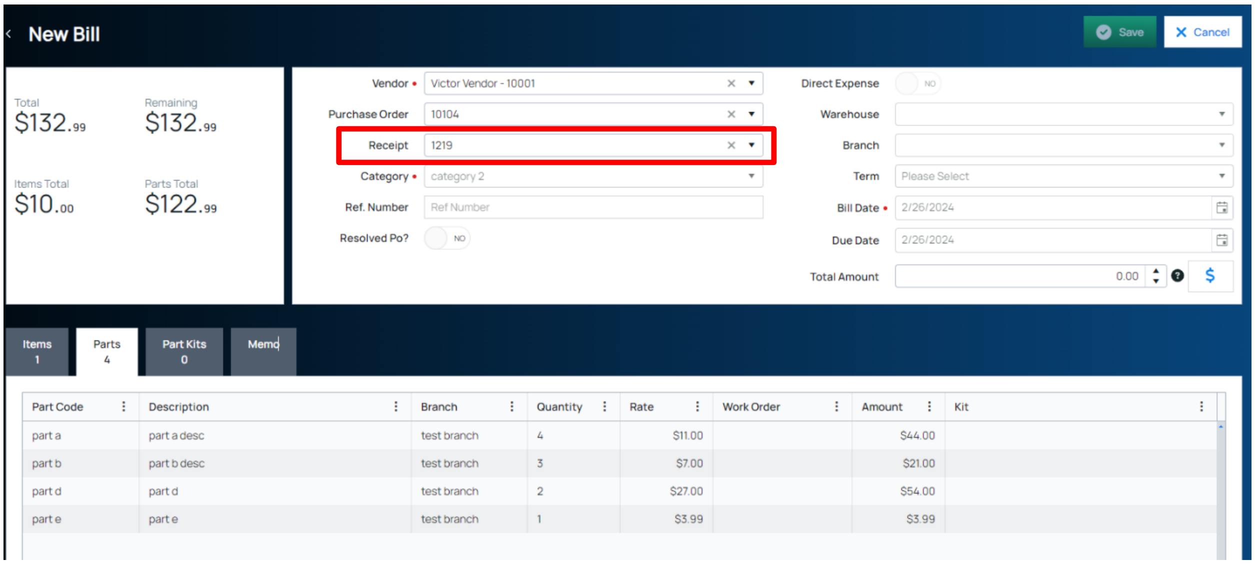
Implemented print functionality for part kits in case of override template functionality

When printing a proposal PDF with override template functionality the part kit details are printed, but the part kit parts are not.

Application Corrections

Vendor Receipt & Vendor Bill Double Entry Into Stock [00093549, 93496]

We fixed an issue where Managely was entering parts to inventory twice: once when entering a receipt and once entering the bill. The New Bill page now has a Receipt dropdown field to use when a user selects a purchase order. When selecting a receipt, Managely adds any items, parts, and part kits from the receipt to the tabs on the bill. If a bill has a purchase order, users cannot add or edit the parts or part kits as these come from the receipt. When selecting a receipt, some fields (such as Category and Ref Number) are disabled, as these values come from the receipt.



When creating a bill that has a Purchase Order number and a Receipt, the receipt is converted to a bill. This moves the part ledger and general ledger entries to the bill. If a user updates the bill later, the part ledger and general ledger entries are updated accordingly.

PO displaying a value of 0 on WO once the PO is resolved [98947]

We resolved an issue where purchase orders were displaying a value of 0 on work orders once the purchase order is resolved.

Master Accounts Sort Invoice By Child Account [00099579]

On the Invoice page for master customers, we added the customer name to group the invoices.

When creating a PO from a WO, the WO column within the PO is displaying the incorrect WO number [00099608]

We added the Work Order Id to the purchase order detail to keep the reference to a work order.

System Created Duplicate Ticket after error [85032]

We added a check for bad dates for the work order appointments. Work order appointment dates validation is used while creating a new work order to check for appointment bad dates, ensuring no duplicate work order is created even after an error.

Work orders have a status of completed with scheduled appointments on them [85082]

We corrected an issue where work orders could be closed that still had scheduled appointments.

System allows you to create a bill directly from a PO when there are parts on the PO, but when parts are on the PO, a receipt should be necessary before a bill is allowed to be made [101463]

On the Bills tab of a purchase order, the Add button is now hidden if there are one or more parts on the purchase order and 0 receipts. If there are no parts, then Add Bill will always be shown regardless of receipts.

Managely display in history AlarmBiller instead of Managely [00101241]

History was displaying everything done by the automation as being done by AlarmBiller instead of Managely. We fixed this issue with these changes:

- We changed the system user's Username, First Name, and Last Name to Managely from AlarmBiller in the Host database.
- We restricted the Username change in Managely Host for a system user (initial host user).
- We made changes to pull the correct username for background jobs.

When doing an estimate, the total labor units do not calculate properly [100203]

Labor units in the Overview tab in proposals are now displaying the correct value.

Change Order-Item Description [00101407]

Users were unable to change the description on an item that was added to a change order. We fixed this issue.

Refund Check Generated [00101503]

When a refund check is generated, the name of the person is not printed on the check. We fixed the issue of the user name not appearing in bulk printing of refund checks.

After disabling credit cards int the setup tables, customers are still able to add credit cards and make payments through the customer portal [00101619]

We have hidden the Add Credit Card button If there is no credit card type accepted.

The focus of the tab selected changes from AP to AR creating confusion [101655]

We made changes to display the menu item if the Add payments button is clicked.

Line Items — Vendors [101901]

We fixed an issue so that users can now select and delete individual items on vendor bills.

Date searches in custom grid layouts return wrong results [102496]

We fixed an issue where the Created Date column on the proposal and work order grids were not displaying the date correctly. The created date was being saved without conversion to UTC, while the pages were converting it back from UTC, so that was causing discrepancy when using the filters. We fixed a similar issue with the Follow Up date on proposals.

In a direct expense PO created from a work order, the line items are defaulting to an unknown work order to direct expense to [103034]

We fixed an issue found on a direct expense purchase order created from a work order, where the line items were defaulting to an unknown work order to direct expense to.

Cannot Copy Site from one customer to the other — getting errors [102336]

To fix errors, on copied systems, we set the Account Number to null as it is not a required field, and there cannot be a duplicate Account Number.

To see transactions you have to click on cc and then back for the transactions to show [102328]

Transactions are now visible without having to click a credit card and then back to see them.

Not billing to Master [102395]

We fixed an issue in the following process that was not billing master as expected: on a customer account that was selected as invoice to master when marking a proposal as sold, choosing complete, and creating an invoice, Managely was not automatically creating the invoice to the master to associate with the customer.

When a bill is created from a PO receipt the receipt disappears and is no longer visible [103036]

We fixed an issue where a purchase order receipt would disappear when a bill was created from the receipt.