



# Managely Release Notes

March 2024

Version 5.3.36

**MANAGELY™**

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## Enhancements

### (Enterprise) Added Work Order Type and Status in System Add/Edit Popup

We added two dropdowns, one for work order type and one for status, in the system add/edit popup on proposals.

You can find these when adding or editing a system on a proposal: Accounts Payable > Proposal > Add Proposal or Edit existing proposal > Systems tab > Add Proposal Systems button.

The screenshot shows the 'Add Proposal System' popup form. The form is divided into two columns of fields. The left column includes: System Number (text input), Account Number (text input), System Type (dropdown menu with 'Burglar Alarm' selected), Panel Type (dropdown menu), Panel Location (text input with a red '0/250' character count), Central Station (dropdown menu), and Comments (text input with a red '0/250' character count). The right column includes: Contract (dropdown menu), Contract System (dropdown menu), Warranty Labor (dropdown menu with 'Labor - 1 Year' selected), Warranty Part (dropdown menu with 'Parts - 1 Year' selected), Warranty Start Date (calendar icon and text input with '3/25/2024'), Service Level (dropdown menu with 'SVC T&M COM' selected), PO Number (text input), Work Order Type (dropdown menu with 'Service Call (comm)' selected), and Work Order Status (dropdown menu with 'New' selected). The 'Work Order Type' and 'Work Order Status' dropdowns are highlighted with a red rectangular box. At the bottom of the form are 'Save' and 'Cancel' buttons.

### (Enterprise) Proposal: Added System Dropdown in Add/Edit (Items, Parts, RMR, or Part Kits)

Managely now allows assigning a system when working with items, parts, part kits, and RMR on proposals. You can find this after adding a proposal and adding items, parts, part kits, or RMR.

Proposal Items tab > Edit Proposal Item:

**Edit Proposal Item : Monthly RMR**

Item Description • Monthly RMR

System

Sales Tax Code • MI

Taxable?  NO

Quantity •

Rate •

Amount \$25.00

Item Cost \$0.00

Total Cost \$0.00

Labor Units •

Total Labor 0

Proposal Parts tab > Edit Proposal Part:

**Edit Proposal Part : 5816**

Item Description • Door/Window Transmitter

System

Sales Tax Code • MI

Taxable?  YES

Quantity •

Rate •

Amount \$50.00

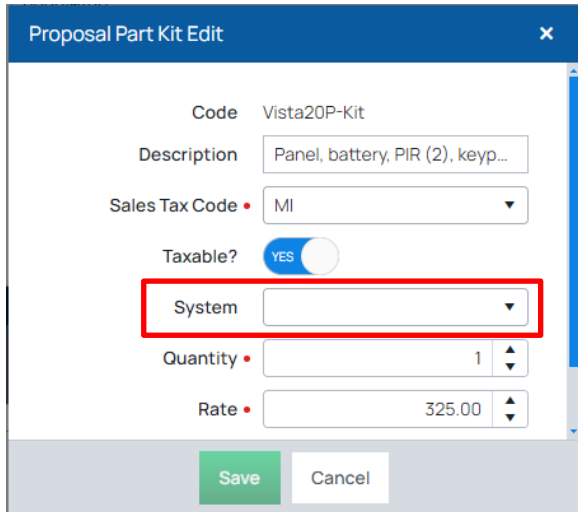
Part Cost \$30.00

Total Cost \$30.00

Labor Units •

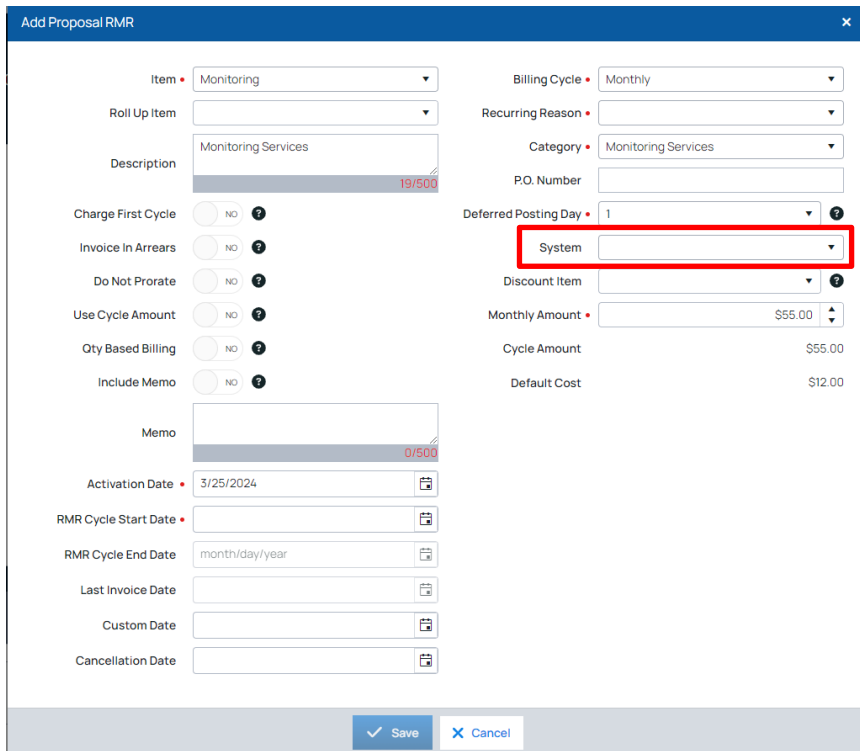
Total Labor 0

Proposal Parts Kits tab > Proposal Part Kit Edit:



The screenshot shows the 'Proposal Part Kit Edit' dialog box. It contains the following fields: Code (Vista20P-Kit), Description (Panel, battery, PIR (2), keyp...), Sales Tax Code (MI), Taxable? (YES), System (dropdown menu, highlighted with a red box), Quantity (1), and Rate (325.00). At the bottom are 'Save' and 'Cancel' buttons.

Proposal RMR tab > Add Proposal RMR:



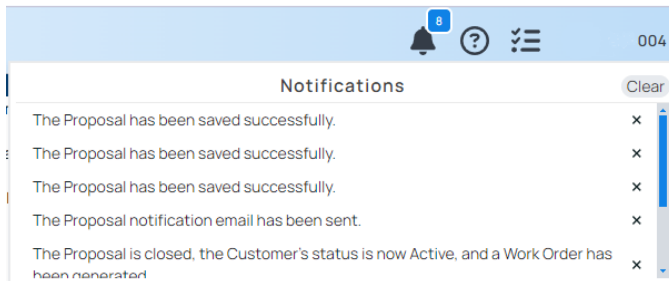
The screenshot shows the 'Add Proposal RMR' dialog box. It contains the following fields: Item (Monitoring), Roll Up Item, Description (Monitoring Services), Billing Cycle (Monthly), Recurring Reason, Category (Monitoring Services), P.O. Number, Deferred Posting Day (1), System (dropdown menu, highlighted with a red box), Discount Item, Monthly Amount (\$55.00), Cycle Amount (\$55.00), and Default Cost (\$12.00). There are also several radio button options for 'Charge First Cycle', 'Invoice In Arrears', 'Do Not Prorate', 'Use Cycle Amount', 'Qty Based Billing', and 'Include Memo'. At the bottom are 'Save' and 'Cancel' buttons.

## Notification Design Change [100717]

Because popup messages were blocking the search bar, we moved the message notification to the page header on the right side.



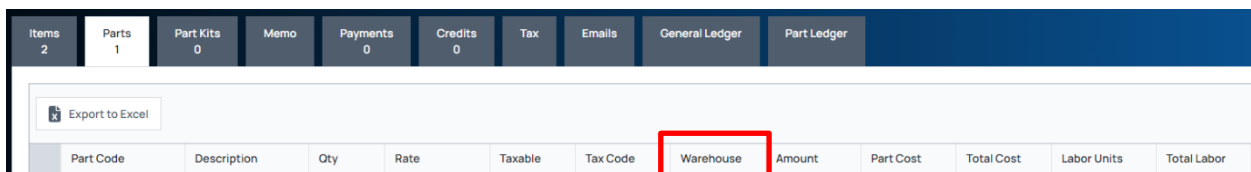
The notification also includes a history of popup messages. Users click the Notification bell to see previous messages. Users can clear the notification history.



## Warehouse Column Added to Invoices [101462]

We added the option to include the warehouse column when adding and editing parts for invoices. Users can add the warehouse column to the grid so they can see the warehouse the part came from and can call out different warehouses for parts on manual invoices.

You can see this on an invoice Parts tab: Accounts Receivable > Invoices > Parts tab.



To change a warehouse, edit the invoice, and click the part:

Edit Invoice Part : 4219
✕

Item Description

Sales Tax Code  Taxable?  YES

Quantity

Warehouse

Rate  Amount \$92.40

Part Cost \$45.00 Total Cost \$45.00

Labor Units  Total Labor 0

✓ OK
✕ Cancel

**(Essentials) Warehouse Column Shown for Parts [99297]**

We added the option to include the warehouse column when adding and editing parts for invoices. Users can add the warehouse column to the grid so they can see the warehouse the part came from and can call out different warehouses for parts on manual invoices.

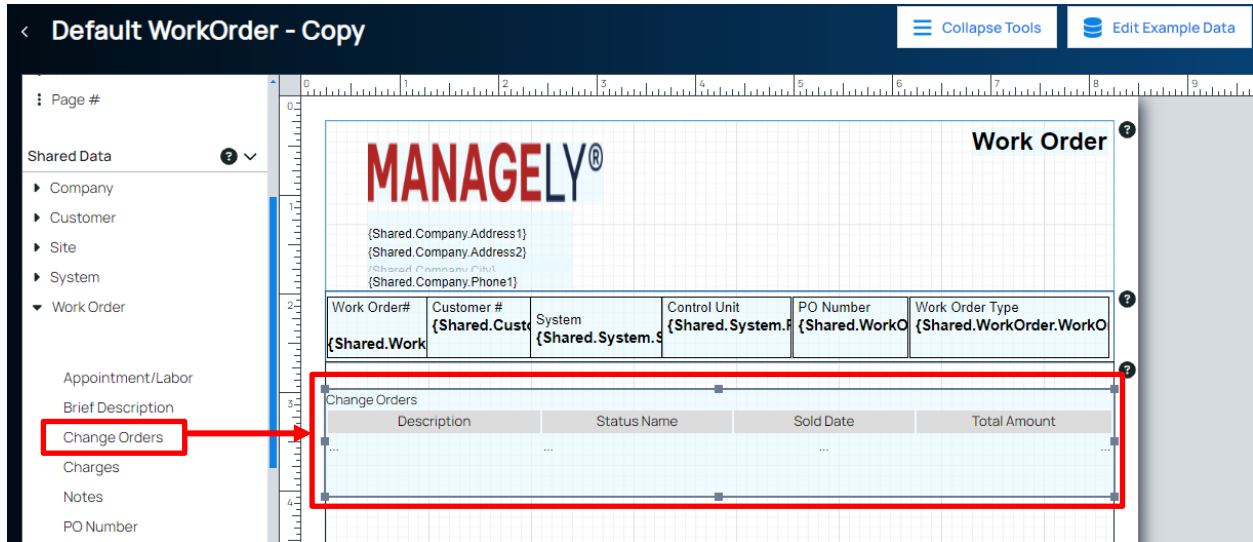
You can see this on an invoice Parts tab: Accounts Receivable > Invoices > Parts tab.

| Items  | Parts       | Part Kits | Memo | Payments | Credits  | Tax    | Emails    | General Ledger | Part Ledger |             |             |     |      |         |          |        |           |            |             |             |
|--|-------------|-----------|------|----------|----------|--------|-----------|----------------|-------------|-------------|-------------|-----|------|---------|----------|--------|-----------|------------|-------------|-------------|
| 2  | 1           | 0         |      | 0        | 0        |        |           |                |             |             |             |     |      |         |          |        |           |            |             |             |
| <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-bottom: 5px;">  Export to Excel         </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Part Code</th> <th style="width: 20%;">Description</th> <th style="width: 5%;">Qty</th> <th style="width: 10%;">Rate</th> <th style="width: 5%;">Taxable</th> <th style="width: 5%;">Tax Code</th> <div style="border: 2px solid red; padding: 2px; display: inline-block;">Warehouse</div> <th style="width: 5%;">Amount</th> <th style="width: 5%;">Part Cost</th> <th style="width: 5%;">Total Cost</th> <th style="width: 5%;">Labor Units</th> <th style="width: 5%;">Total Labor</th> </tr> </thead> </table> |             |           |      |          |          |        |           |                |             | Part Code   | Description | Qty | Rate | Taxable | Tax Code | Amount | Part Cost | Total Cost | Labor Units | Total Labor |
| Part Code  | Description | Qty       | Rate | Taxable  | Tax Code | Amount | Part Cost | Total Cost     | Labor Units | Total Labor |             |     |      |         |          |        |           |            |             |             |



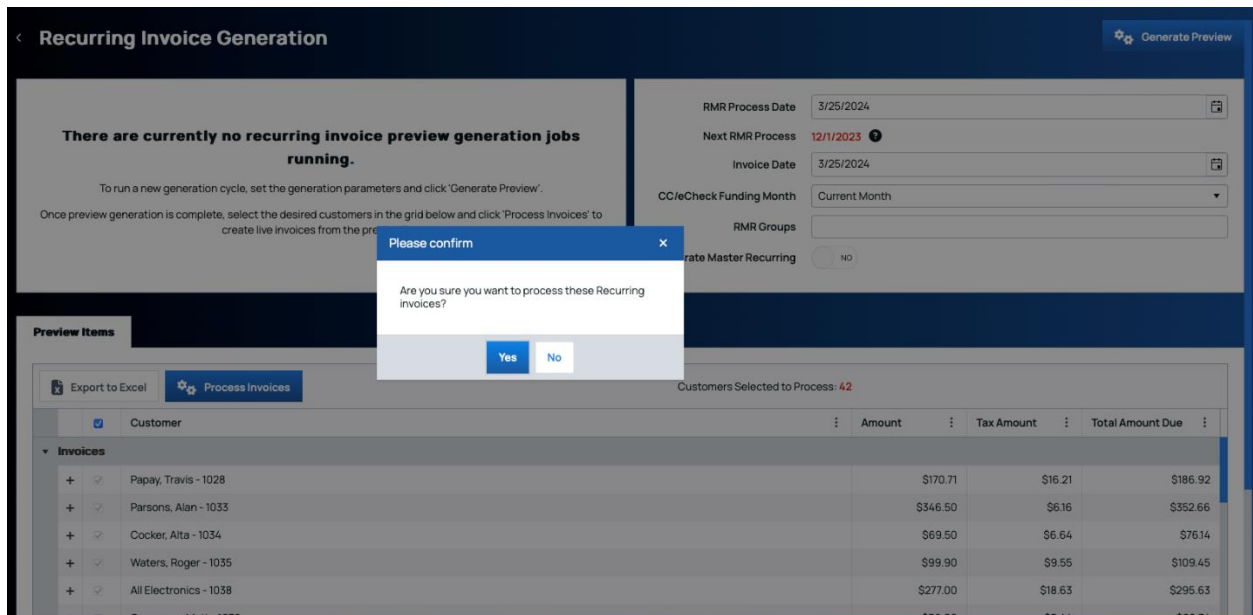
## Change Order Information Option to Print on Workorder [101704]

We added change order information to Workorder Template Editor in Setup: Setup > Utilities > Template Engine.



## Confirmation on Running Recurring [101511]

We added a confirmation popup before processing recurring invoices. Also, we hid the Process Invoice button if data is not available in the grid.



## Added Automation Number as Column on Collection Queues Screen [102810]

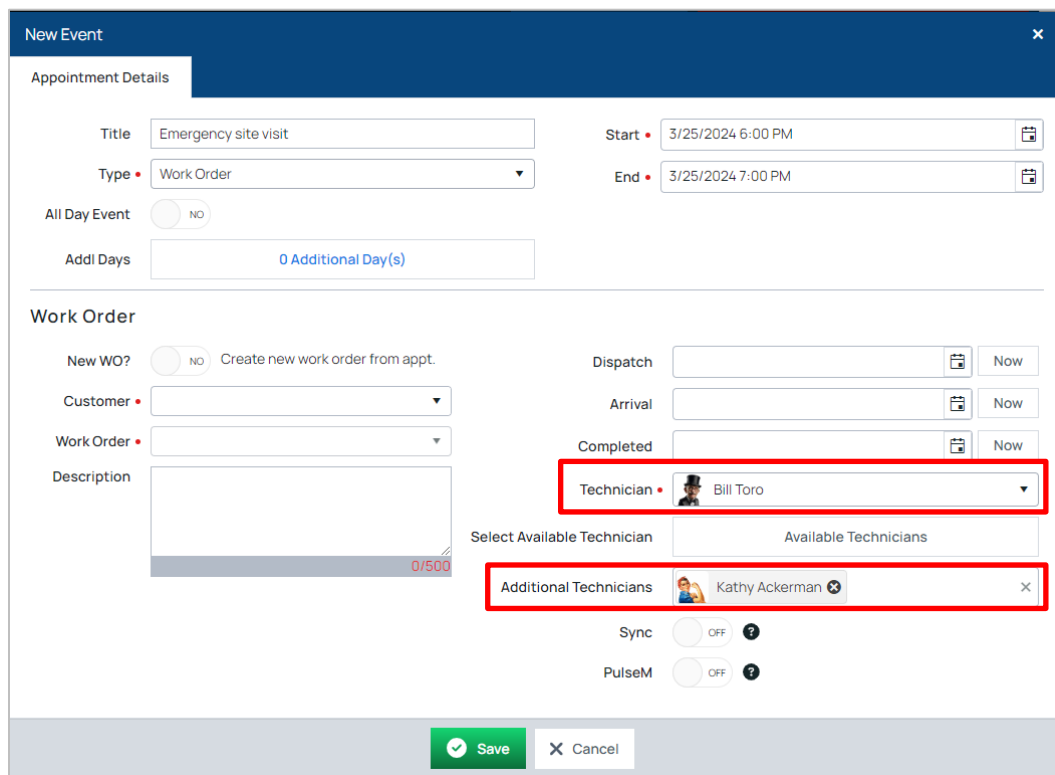
We added the Auto Sequenced Queue and Auto Sequencing Number columns to the Collections page: Accounts Receivable > Collections.



## Added Pictures of Technicians on Dropdowns

We added the technician's picture to go with the technician's name in the following places. (This applies to any additional technicians added as well.)

- Calendar Add/Edit Work Order Appointment
- Work Order Add/Edit Appointment
- Work Order Add/Edit Timesheet



## **RMR Transfer when Transferring a Site**

When transferring a site, RMR is copied and original RMR is removed. Also, documents are copied from the site and system.

## **Application Corrections**

### **Work Order without system; warranty information not displayed based on selected site [101751]**

Managely is now pulling correct warranty information for work orders.

### **Not able to invoice a particular work order [94755]**

Managely is now refreshing the total percentage and total amount in progress invoices when a user clicks the New Work Order Invoice button. Additionally, this includes a check to account for the inactive status of the invoice. Finally, we added a check to validate the inactive status of the invoice.

### **Cannot adjust the accounts under expense types and they are incorrect [101231]**

Users can now edit base expense types.

### **Printed statements using wrong statement template [101987]**

When running a mass customer statements from the Setup, Managely was using the default statement instead of the statement assigned to the customer. We fixed this so Managely gets the customer template Id based on customer.

### **When doing progress billing on a workorder the percentages are not accurate when parts are on a workorder [101702]**

Progress invoice creation now considers if parts and labor are under warranty or not.

### **Bill to email error [101210]**

Managely is now using the bill to email over the customer email.

### **Can't search Managely for a contact either from the all search or the contact search on the top [103875]**

We fixed the global search to include searching for contacts.

### **Invoices showing open balance when there is no balance [102405]**

We fixed an issue where invoices were showing an open balance even when there was no balance.

### **Incorrect Time Zone is showing that we are adding notes at 4am - How do we update to our time zone? [103475]**

We corrected an issue with the modification time for notes entered for work orders.

### **RMR total is not calculated after filters applied [103827]**

We moved the Monthly Total Amount to the footer of the grid and changed calculation to display as expected.

### **In the RMR search you cannot use the search filter to locate an RMR by number; it won't return any data [104275]**

We added a filter for RMR number on the search box.

### **Customer portal password issues [104918]**

We updated the email content so that users can easily copy and paste their temporary password.

### **Company information incorrect in error message received when registration fails [105272]**

To resolve this issue, we made these changes:

- We are using company information to pull the phone number for the error message.
- We fixed an issue with the login page errors not showing up after the notification popup changed.
- We extended the duration of a popup visibility for the New Customer Portal Registration error message.

### **eForms on Edge & Firefox [105403]**

We fixed an issue where the add credit card button was missing from the Edge and Firefox browsers.