Managely Release Notes

May 2024

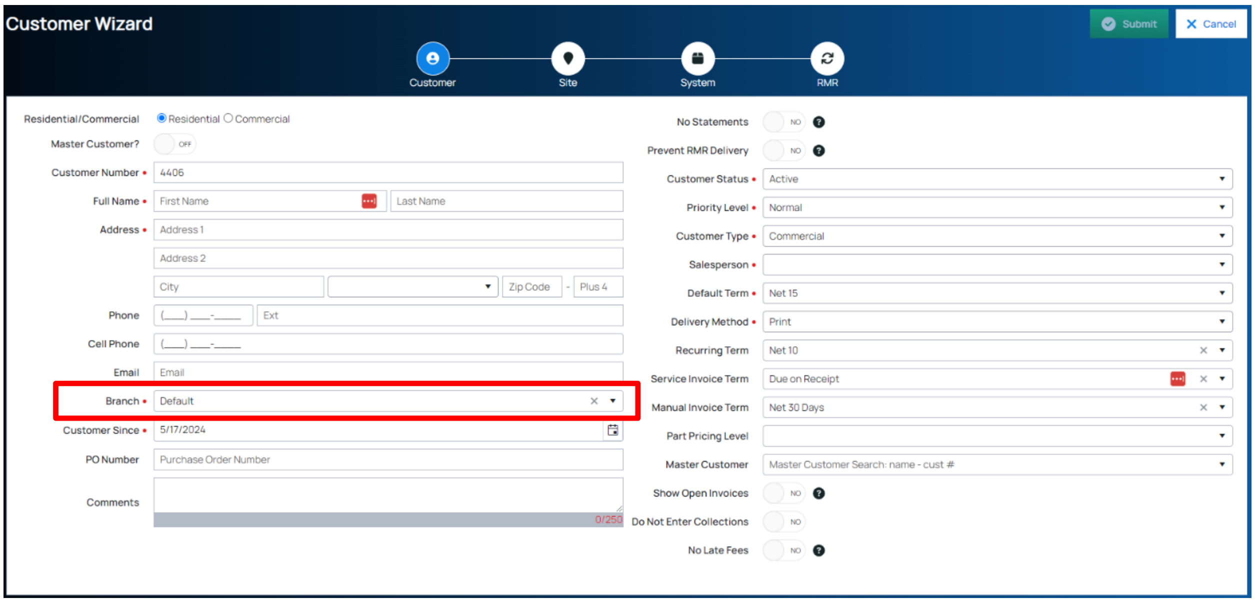
Version 5.3.38

Contents

Enhancements

Added Default Branch and Made Required on Customers [102802]

Branches are now required on customers. When creating a customer, the branch shows the default branch, which users can change.



The default branch comes from the System Defaults page (Setup > Company > System Defaults).

Part Pictures can be shown on eForms [103673]

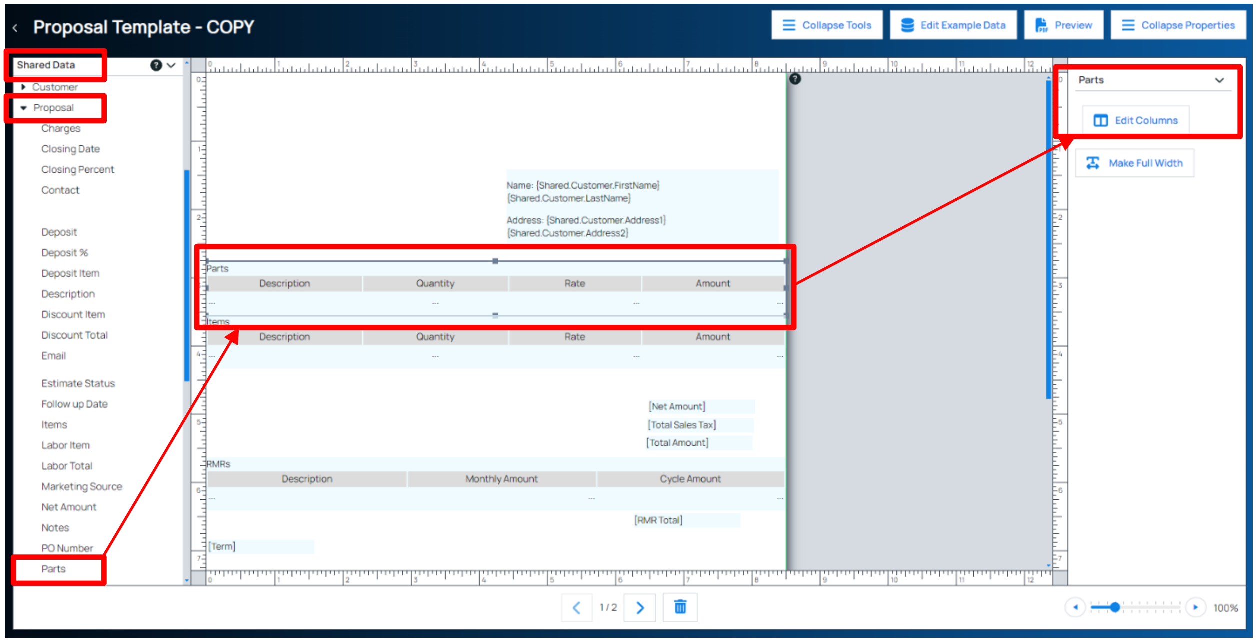
Users can enable the Part Image column in the eForm designer and see the images when previewing and signing the eForm.

Parts

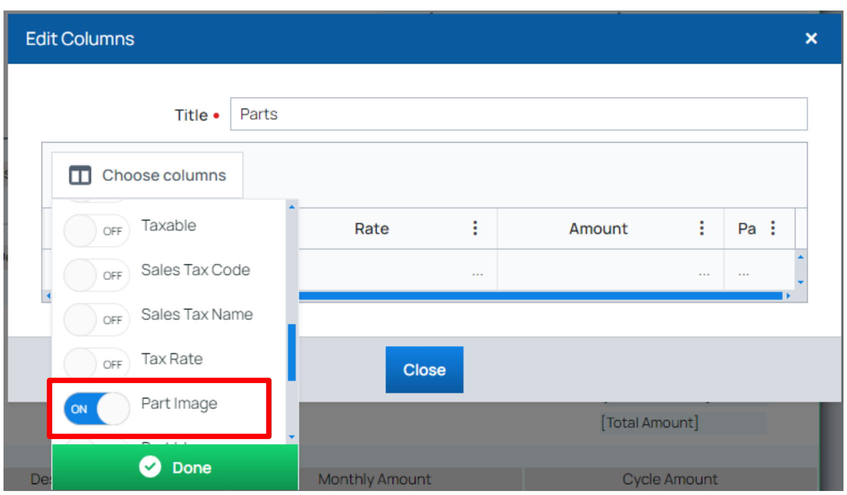
Description	Quantity	Rate	Amount	Part Image
Wireless Motion Detector	1.00	¤125.00	¤125.00	
Work Gloves	1.00	¤48.00	¤48.00	
Vista 100 Control Panel	1.00	¤900.00	¤900.00	

1. Create or redesign a template (eForms > Templates). This example uses a proposal template.
2. In the Shared Data section, click Proposal to expand it, and drag the parts widget to the template page.
3. On the page, click the parts widget.

4. In the panel on the right, click Edit Columns under Parts.

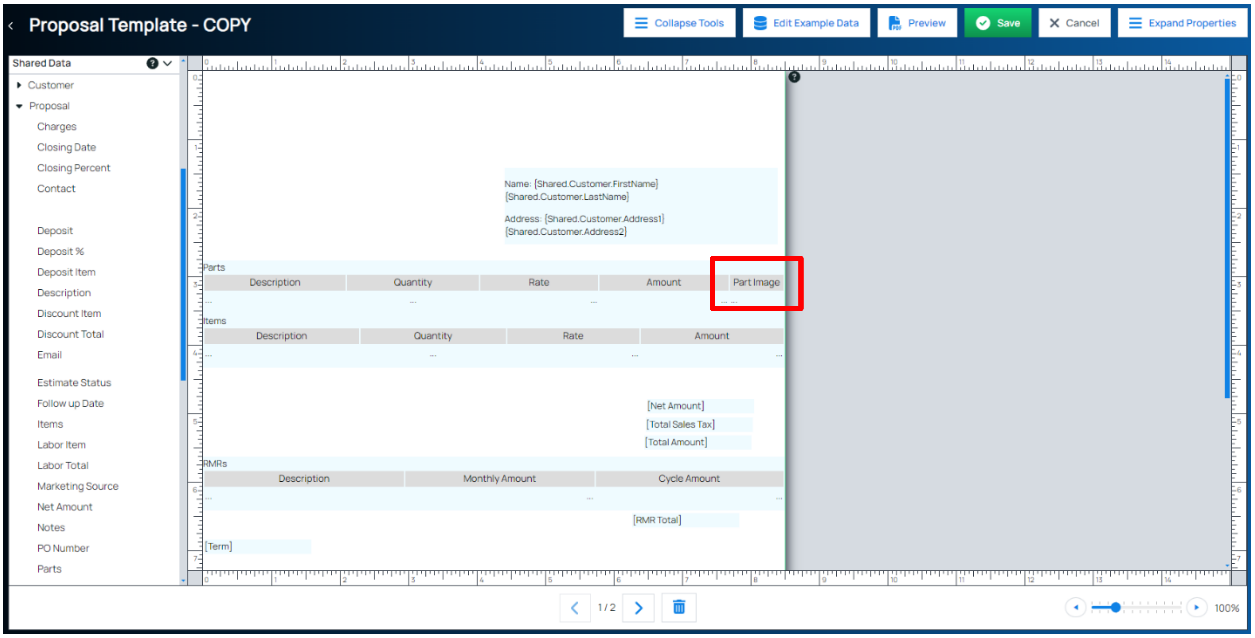


5. The Edit Columns form opens. Click Choose Columns.
6. Scroll down to Part Image and click the switch ON.



7. Click Done and click Close.

The Part Image column is visible on the part widget.



Part images come from the Parts page. (Setup > Items & Parts > Parts)

Added Contrast to Section Headers on Invoices [79578]

We added color contrast to the section headers on invoices. This change makes the invoice PDF files similar to the AlarmBiller product. Invoice PDF files now have highlighting like this:

Charges

Description	QTY	Rate	Amount
Jimmy's Site, 98765 Someplace Ave, OH			
recurring item, (04/01/2024 - 05/31/2024)	2.00	$35.00	$70.00
Radio Backup Monitoring, (04/01/2024 - 05/31/2024)	2.00	$35.00	$70.00
recurring item, (04/01/2024 - 05/31/2024)	2.00	$35.00	$70.00
recurring item, (04/01/2024 - 05/31/2024)	2.00	$45.00	$90.00
recurring item, (04/01/2024 - 05/31/2024)	2.00	$35.00	$70.00
recurring item, (04/01/2024 - 05/31/2024)	2.00	$35.00	$70.00
recurring item, (04/01/2024 - 05/31/2024)	2.00	$35.00	$70.00
recurring item, (04/02/2024 - 06/01/2024)	2.00	$35.00	$70.00
Site Two, 1345 Nowhere Ave, OH			
recurring item, (04/01/2024 - 05/31/2024)	2.00	$35.00	$70.00
Site Two, 1345 Nowhere Ave, OH			
recurring item, (04/01/2024 - 05/31/2024)	2.00	$55.00	$110.00

To generate and preview invoice PDF files, navigate to Accounts Receivable > Invoices.

Proposal Follow-up Date can be Deleted [105497]

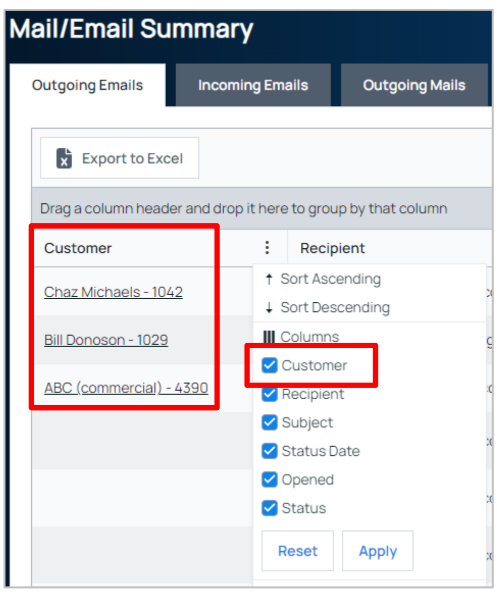
On proposals, when users would clear the follow up date, they would expect the date to be empty (or blank). However, when changing this and saving the proposal, Managely was setting the date to a value of "12/31/1969 18:00".

Now the proposal follow-up date will show no date as expected when a user clears the date.

The proposal follow up date is visible on the proposal page (Accounts Receivable > Proposals). Edit the proposal to change the follow up date.

Added the Customer Number and Name to the Mail/Email Summary Report [100334]

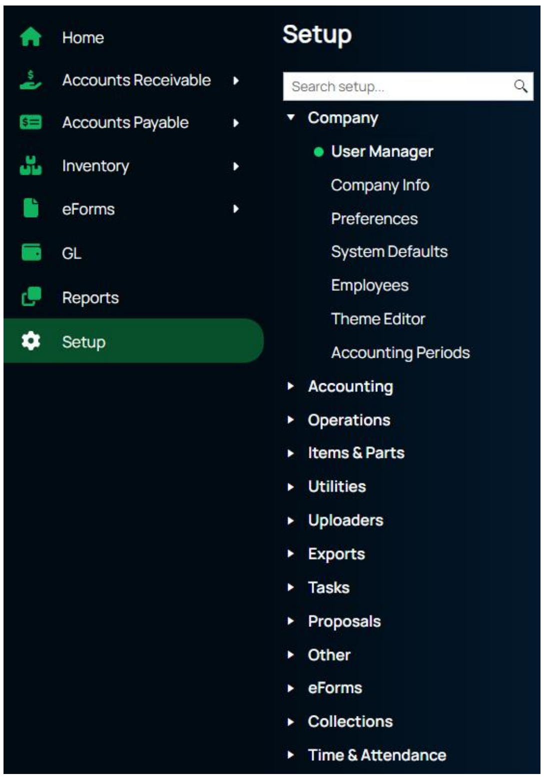
Users requested to have the customer name and number that can be added to the grid on the Mail/Email Summary report (Reports > Customer > Mail/Email Summary report). For this, we added another column, Customer, that users can add to the grid to show the customer's name and number.



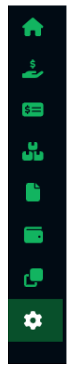
Sub Menus Now Also Collapse

The Reports and Setup sub menus will now collapse and expand with main menu.

This is an example of the Setup menu that is expanded:



This is an example of the Setup menu that is collapsed:



Application Corrections

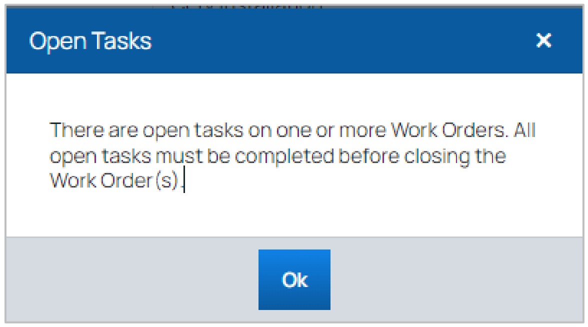
Error communicating with the server: user is not authorized to access this resource [101706]

This was occurring when a user would browse through Managely and would attempt to open a tab with eForms. The eForms tab will no longer load when the user does not have access to eForms.

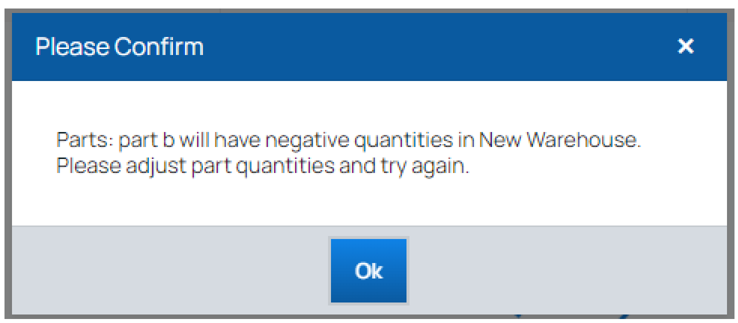
Work order with status Ready to Bill missing functionality

We added the following to the Close and Invoice functionality when the work order status is Ready To Bill:

1. If there are open tasks on the work order(s), a message will notify the user and prevent completion of the work order.



2. If there are parts to be issued, and the warehouse has insufficient quantity, and inventory does not allow negative quantities, a message will indicate this to the user and prevent completing the work order.



3. Part kits are now included when closing a Ready to Bill work order.
4. A progress invoice will be created for the remaining % on the work order when it is closed from the Ready To Bill tab.

Host users can't edit third party integration connections [104615]

To resolve this issue, we gave a host user admin privileges in the dealer portal.

AP Report is not pulling or taking forever to pull [106404]

We resolved this issue by improving the efficiency of the report.

Qty Based Billing [106379]

The quantity-based billing information is now transferred to the RMR from the proposal; is shown on the invoice when it is generated; and is on the work order when it has been completed.

The RMR Bill To Field is not available when first creating a new RMR item [109124]

We resolved the issue of a blank Bill To Address found when editing RMR by setting a default bill to when initially creating the customer.