Managely Release Notes

June 2024

Version 5.3.39

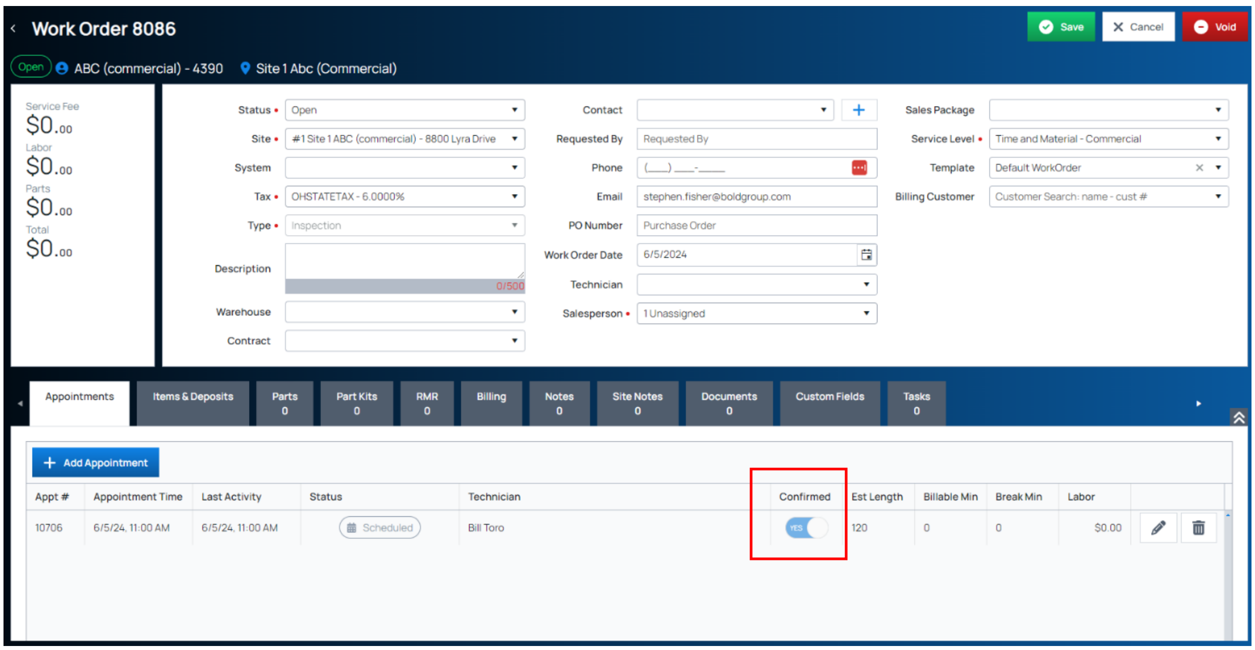
MANAGELY®

Contents

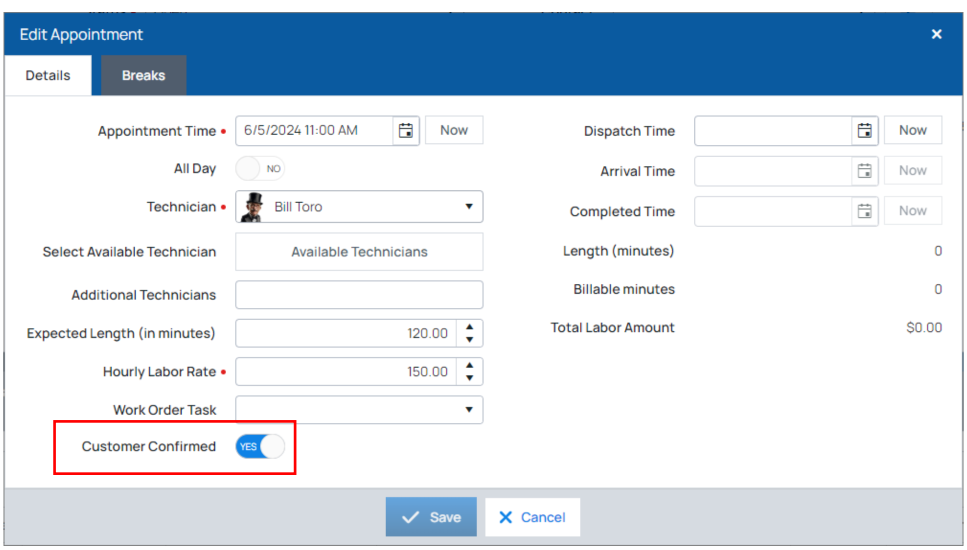
Enhancements

Visual Indicator Added to Appointment on Work Order Appointments Grid [105264]

On the work order detail page, on the Appointments tab, we added a column called Confirmed. In the list of appointments, this shows which appointments have been confirmed by the customer.



Users can set this switch to yes or no when adding or editing an appointment.



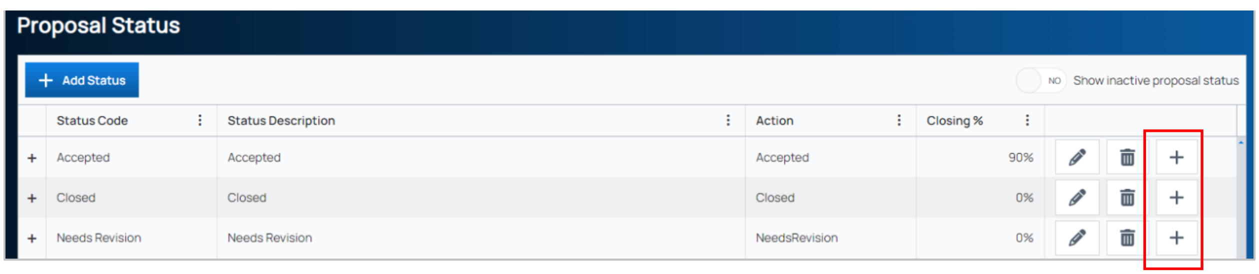
Parts Limited to Vendors on Work Orders When Creating Purchase Orders [105654]

When creating purchase orders and selecting vendors, all parts from inventory were shown. We changed this to show only the parts from the selected vendor. Now, when creating a purchase order from the PO listing page, the only parts listed are associated with the vendor. In addition, when creating a purchase order from the work order detail page on the create PO popup, when a vendor is selected, only parts associated with the vendor are shown.

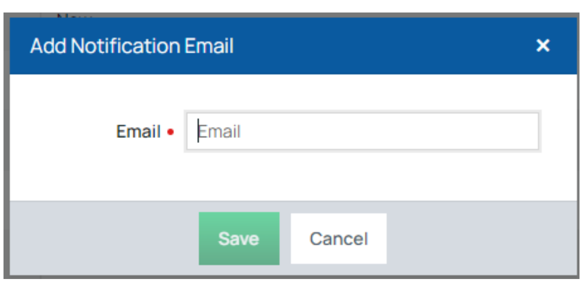
Vendors are added to parts on the Parts page. (Inventory > Parts -or- Setup > Items and Parts > Parts)

Email Notification On Proposal Status Change

On the Proposal Status page (Setup > Proposals > Proposal Status), we added a button to the rows of the grid for adding email addresses to the statuses. Adding email addresses to the statuses alerts the recipients when the status of a proposal changes.

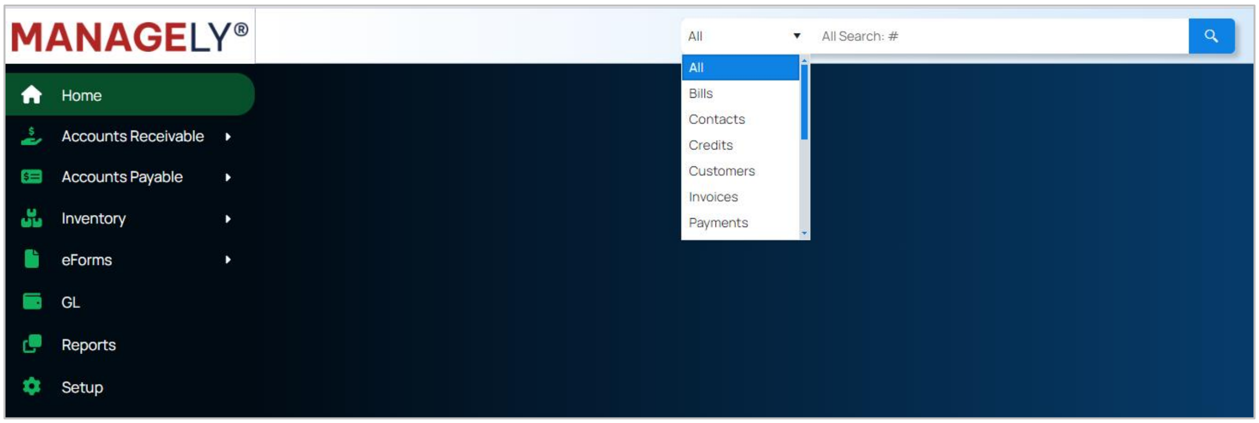


Click the **+** button to add an email address:



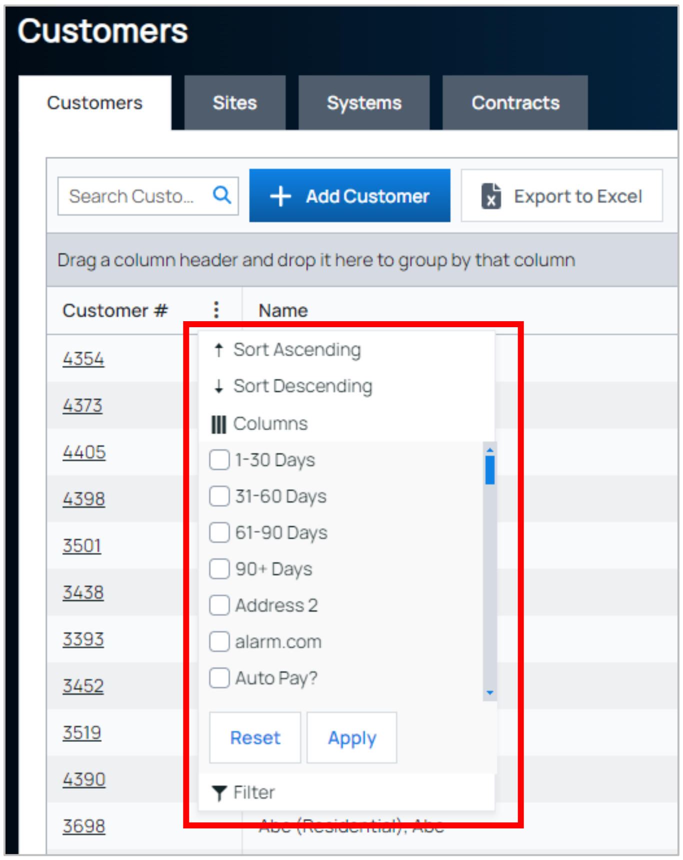
Values Alphabetized in Search Combo List (Top Header)

At the top of the Managely page, there is a global search field. Users can narrow the search by category. We alphabetized the categories that users can select in the dropdown beside the search.



Alphabetized Values in the Column Selection for Grids

We alphabetized the list of columns that users can select for grids. For example, this is the Customers page grid showing the columns that can be selected:

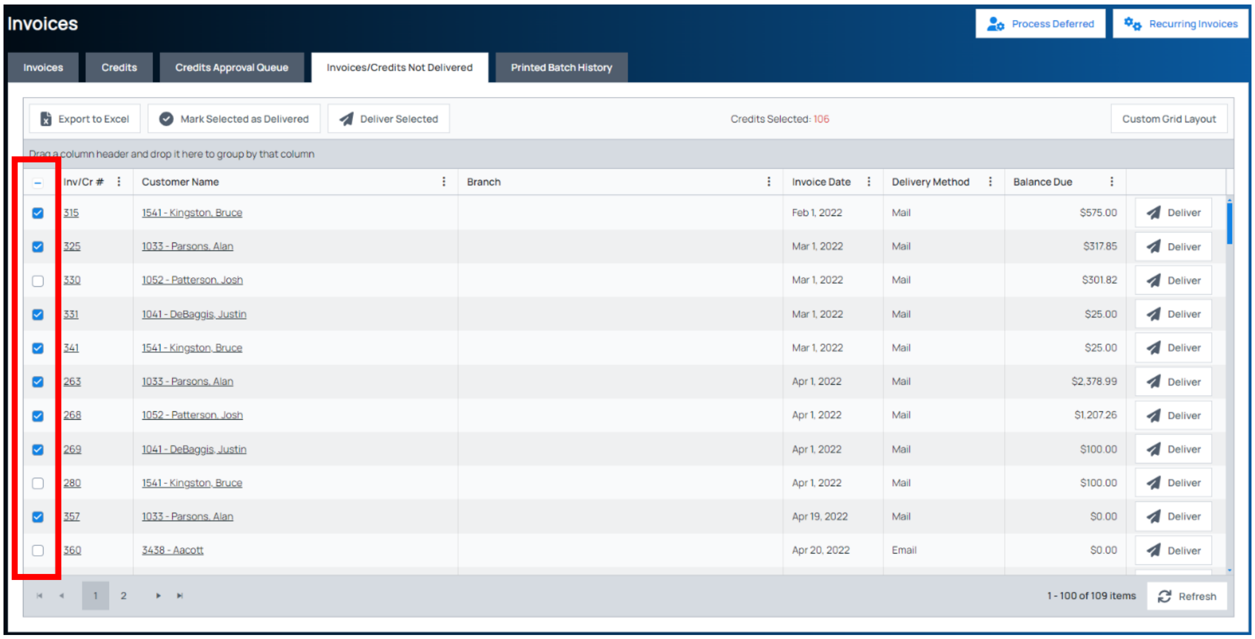


We alphabetized the list of columns that can be selected for the grids on these pages:

- Customers page, all tabs (Accounts Receivable > Customers)
- Invoices page, all tabs (Accounts Receivable >Invoices)
- Deposits page (Accounts Receivable > Payments > Deposits)
- CC/eCheck Transactions page, all tabs (Accounts Receivable > Payments > CC/eCheck)
- Unapplied Payments page (Accounts Receivable > Payments > Unapplied)
- Refunded Payments page (Accounts Receivable > Payments > Refunded)
- RMR page, all tabs (Accounts Receivable > RMR)
- Work Orders page, all tabs (Accounts Receivable > Work Orders)
- Proposals page, all tabs (Accounts Receivable > Proposals)
- Collections page (Accounts Receivable > Collections)

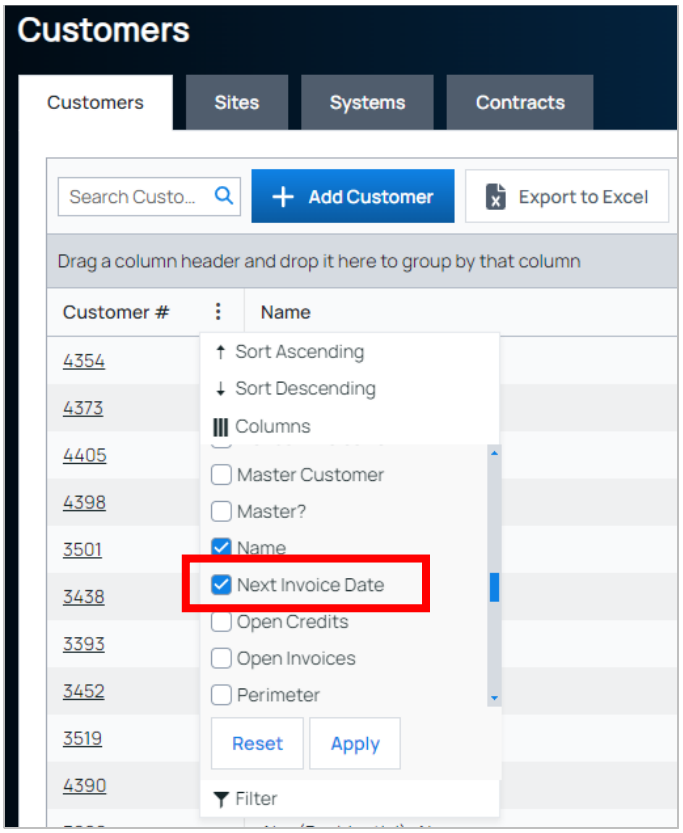
Single Items can be Deselected After using the Select All Action

On grids that have the select all function, which is the checkbox at the top left of the grid rows in the first column, individual items can now be deselected. For example, if users select all invoices/credits in the grid, they can deselect individual ones leaving the remaining selected.



Next Invoice Date Added to Column Options on the Customer Grid

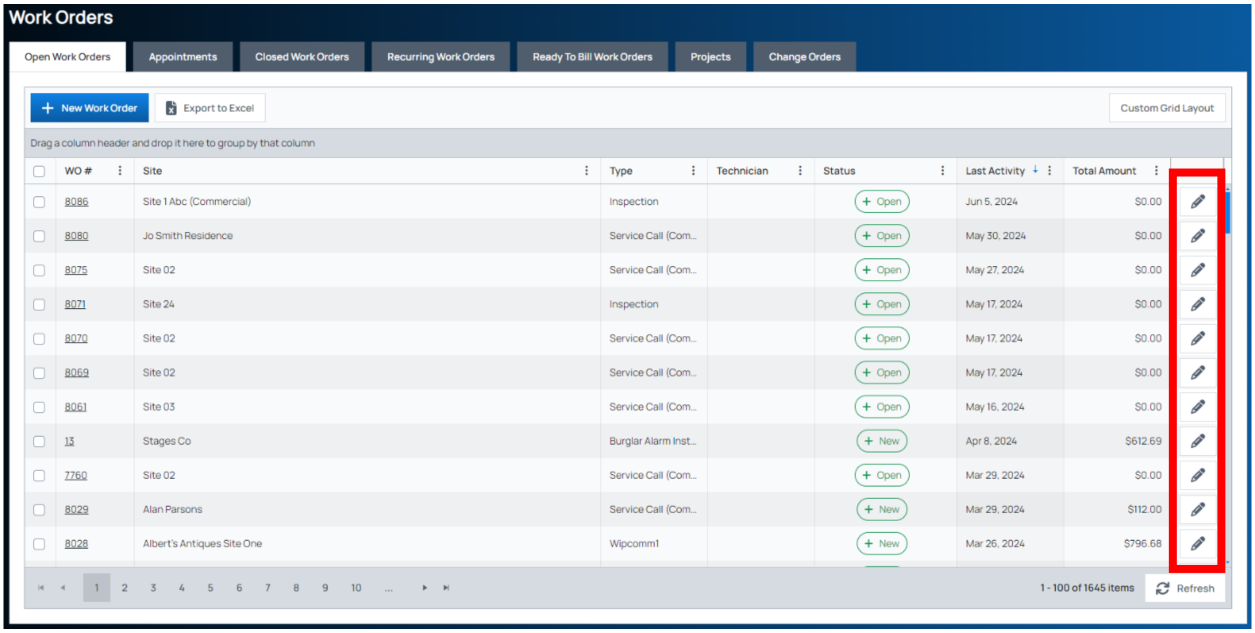
On the Customer page, we added the Next Invoice Date as a column that users can select to add to the grid:



Edit Button Added to Open Work Orders, Customers, Sites, Systems, and Proposals

When viewing the list of open work orders, customers, sites, systems, and open proposals, we added an edit button on the grid row that opens the entity in edit mode.

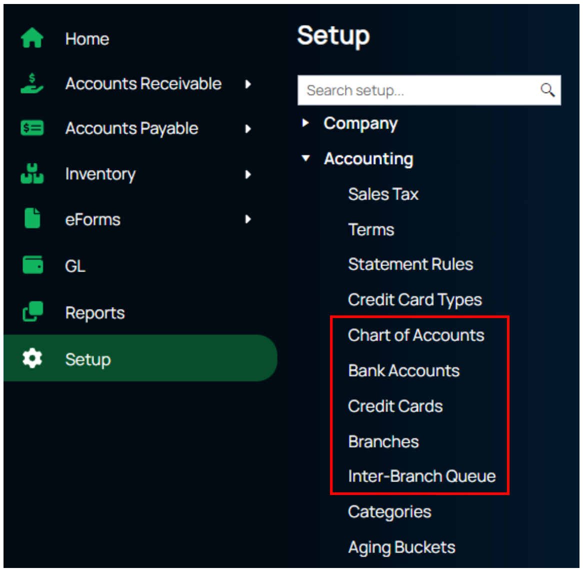
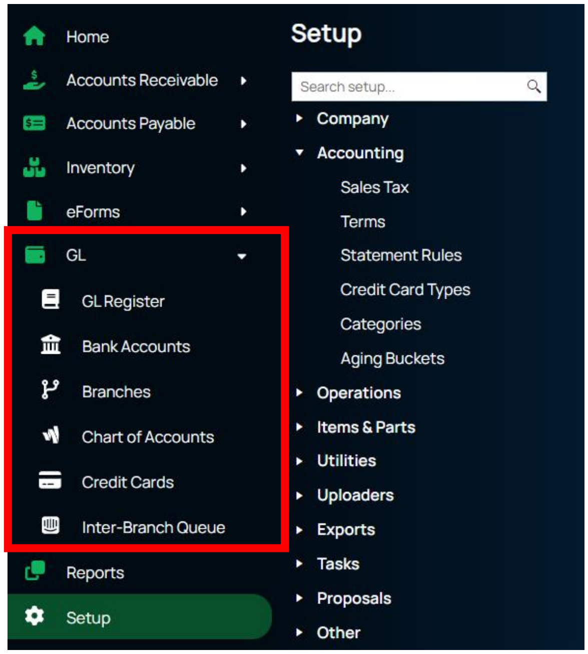
For example, this is the Work Orders page showing the edit button in the grid rows:



Menu Change: Menu Items Moved from Setup to GL Menu

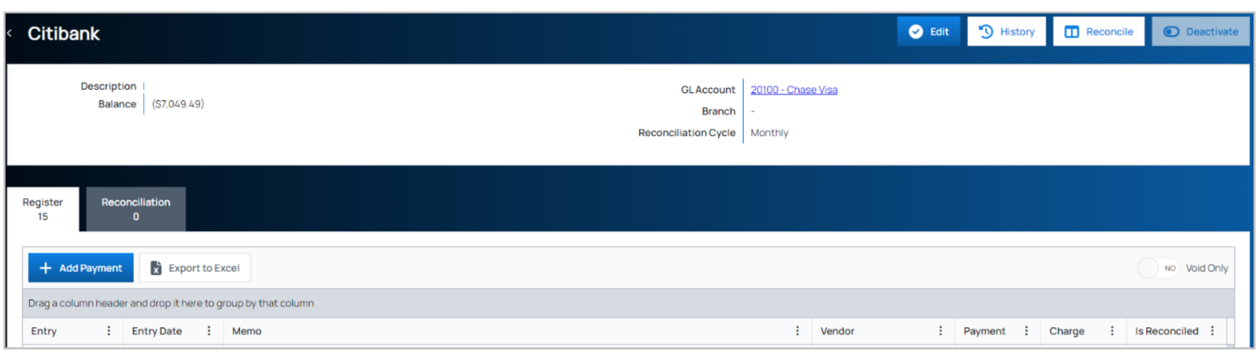
We moved these menu items from the Setup menu (Setup > Accounting) to the GL menu:

- Bank Accounts
- Branches
- Chart of Accounts
- Credit Cards
- Inter Branch Queue

Former Setup > Accounting menu:	New GL Menu and Setup > Accounting Menu
	

Renamed Columns on Credit Cards Screen

On the Credit Card detail page (GL > Credit Cards), we renamed two columns: the column called Deposit is now called Payment and the column called Withdrawal is now called Charge.



Application Corrections

Parts received on PO not hitting my GL for my warehouse [96101]

When a purchase order was received, a receipt was being generated; however, the part ledger was not being populated by the received parts and no GL activity was being generated because there was an error during the receipt creation process. We fixed this issue so that no receipt record will be created if there is an error while trying to create a receipt.

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

When users would create a bill from a purchase order receipt, the receipt would disappear. We changed this so that when a user creates a bill from a receipt on a PO, the receipt is no longer converted to a bill. The bill is created separately from the receipt with its own GL entries. The receipt remains on the purchase order and still has all parts, items, and part kits on it.

Managely allows you to create bills for parts where there is no receipt for those parts [93496]

Managely was allowing users to create bills for parts where there is no receipt for those parts, and also Managely was allowing users to create a bill for a receipt, and then add parts to that bill that are not on the receipt(s). To resolve these, we made these changes: we removed the add part functionality when the Direct Expense switch is NO on the bill, and we removed the bill parts from the grid if the Direct Expense switch is NO on the bill.

Refund Check [99333]

We resolved an issue where users issued a partial refund of a payment but then could not apply the remaining balance of the payment to an open invoice.

Issue with connection on Forte/Dex [105906]

Users reported when opening the add credit card Forte window the first time there was lag. The lag time is related to the time Forte takes to respond when the initial connection with Forte is being established. We disabled the Add button and added a loading spinner while displaying a Please Wait message.

RMR Cycle Start Date for New Customer [106455]

We fixed an issue with the RMR step on the customer wizard where the RMR cycle start date was reverting to the current date instead of the date entered.

Work order items displayed with $0 on invoice when they should not [00106733, 108977]

Items from work orders were displayed with $0.00 on the invoice when they should not. This was caused by an issue where disabling the invoice labor on the service level also caused the service items to not be invoiced at the proper amount.

Rename “Available Credit” To “Balance Due” On “Invoices/Credits Not Delivered” Grid

On the Invoices page, Invoices/Credits Not Delivered tab, we renamed the column ‘Available Credit’ to ‘Balance Due’.