Managely Release Notes

July 2024

Version 5.3.40

Contents

Enhancements

Allowing Change to Work Order Type

Users can change the work order type immediately after creating the work order under certain conditions depending on the tier of Managely you are using.

For Managely Essentials, users can change a work order type:

1. If it is not completed yet, which disables the **Edit** button.

For Managely Pro, users can change a work order type:

1. If the work order itself is editable
2. If the work order is not locked

For Managely Enterprise and up, users can change a work order type:

1. If the work order itself is editable
2. If the work order is not locked
3. If the work order does not have any purchase orders (because purchase order bills generate GL entries for selected GL accounts of the costing method for a work order type)
4. If the work order does not have any parts issued or returned (because issuing parts generate GL entries for selected GL accounts of the costing method for a work order type)

Profit & Loss Report Sections Follow Standard Accounting Practices

We changed the Profit and Loss report so the sections follow standard accounting practices:

- Income
- Cost of Goods Sold
- Gross Profit (calculated)

- Expenses
- Total Operating Expenses (calculated)
- Operating Income (calculated as Gross Profit - Total Expenses)

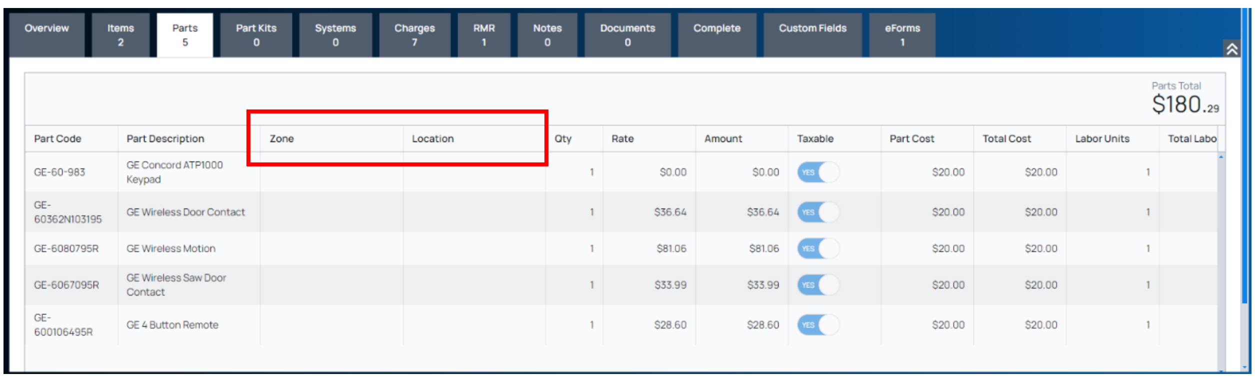
- Other Income & Expenses (combines both Other Income and Other Expenses into one section)
- Net Income (Loss)

We added a new section to the report called Categories. This section is visible if selected in the report parameters.

The branch name will appear in the top-left corner of the report if a branch is selected.

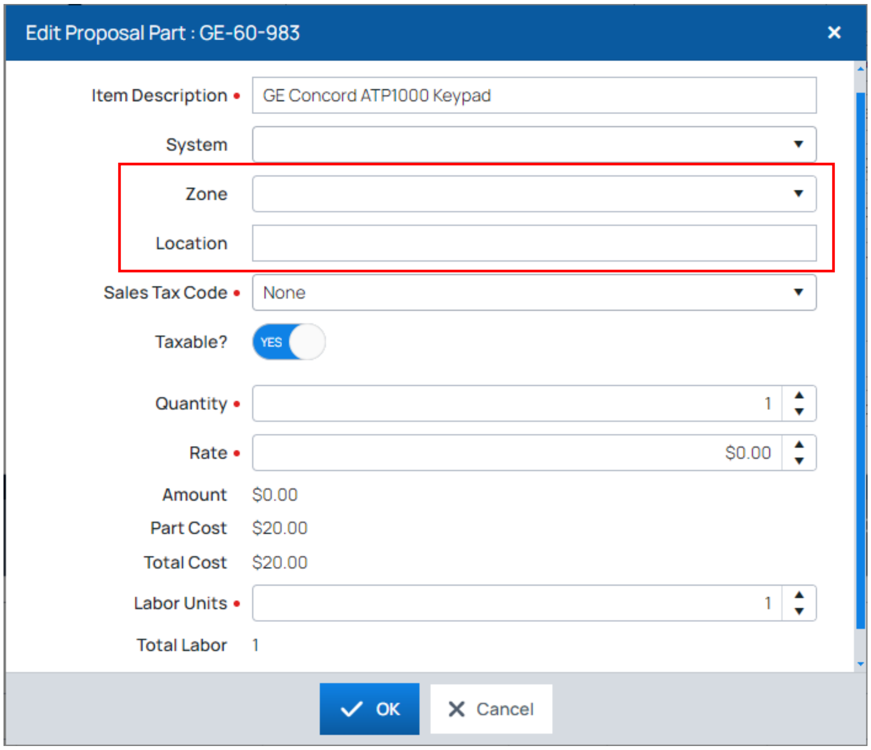
Parts Location (Zone/Location) Shown on Proposals

For proposals, on the Parts tab, we added two columns: Zone and Location. Navigate to this to see these: Accounts Receivable > Proposals > Proposal detail > Parts tab.



Part Code	Part Description	Zone	Location	Qty	Rate	Amount	Taxable	Part Cost	Total Cost	Labor Units	Total Labo
GE-60-983	GE Concord ATP1000 Keypad			1	$0.00	$0.00	YES	$20.00	$20.00	1	
GE-60362N103195	GE Wireless Door Contact			1	$36.64	$36.64	YES	$20.00	$20.00	1	
GE-6080795R	GE Wireless Motion			1	$81.06	$81.06	YES	$20.00	$20.00	1	
GE-6067095R	GE Wireless Saw Door Contact			1	$33.99	$33.99	YES	$20.00	$20.00	1	
GE-600106495R	GE 4 Button Remote			1	$28.60	$28.60	YES	$20.00	$20.00	1	

Complete these fields when adding or editing parts for the proposal.



Zone: This is a drop down list. Values come from the site or system defined on the customer on the proposal. If this list is blank, there are no site or system zones for the customer.

Location: This is a free text field. It can be used to provide a short text description of the location related to the part.

On the proposal eForm, these fields are available to add as part columns.

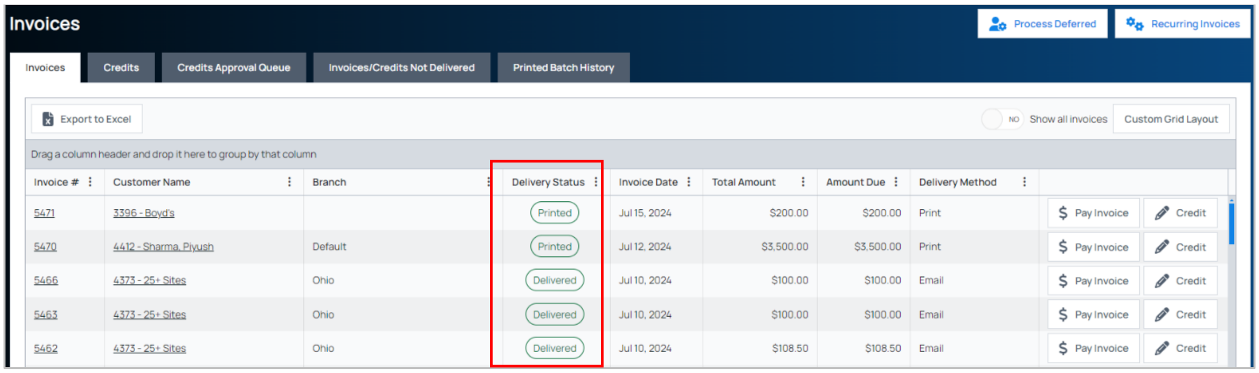
Debits Displayed Before Credits in All Grids

We changed the General Ledger Entries grid so debit transactions are listed before credit transactions. This follows standard accounting practices and simplifies manual reviews and reconciliation procedures.

Added Invoice Delivery At-A-Glance Status to Invoice Grid

On the Invoices page (Accounts Receivable > Invoices), we added a column called Delivery Status to show users the delivery status for the invoices in the grid.

If the Delivery Method column for the invoice is set to Print, then the Delivery Status column displays Printed or Not Printed, depending on its status. If the Delivery Method is set to Email, then the Delivery Status column displays Delivered or Not Delivered, depending on its status.



Added Proposal Number to the Subject on Proposal Emails

Proposal emails now include the proposal number in the subject of the email.

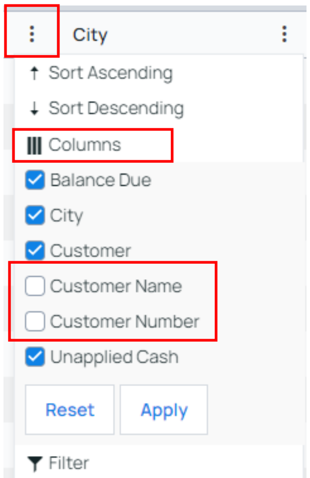
Multiple Email Addresses Allowed on Proposal Ad-Hoc Email Action

For sending proposals, we enabled support for multiple email addresses in the **Email** field on the Proposal Delivery Options popup.

Added Customer Name/Number as Separate Columns on Unapplied Payments [115047]

On the Unapplied Payments page (Accounts Receivable > Payments > Unapplied), we added two columns that must be unhidden: Customer Name and Customer Number. By default, these columns are hidden.

Users can unhide these by clicking the three vertical dots beside a grid column in the heading row; clicking Columns; and selecting Customer Name or Customer Number or both.



Application Corrections

Work order print error [105712]

We resolved an issue that was preventing a work order from printing.

Avoid Adding Time To GL Entries When Persisting Dates [109304]

Income statements were not calculating correctly and dates were off. With this fix, Issue/Returns and Bills/Receipts/Credits will create GL entries that zero out the time component of the date.

On eForms, when creating eForm and sending to myself, the fields from the 3rd page are showing on the first page, even though they are on the 3rd page [106574]

We adjusted the page break section to ensure that the fields from the third page appear as expected when users navigate through the form.

Proposal: total recurring services amount is incorrect [110793]

We added the Total Monthly and Cycle Amount fields to the proposal. This helps provide users with a comprehensive overview of monthly and cycle financial data.

How does the tag feature work in tasks? [110901]

We fixed the issue with tag filtering in tasks so that filtering works as expected.

Late fees are incorrect on customer's statement [109185]

We resolved this so that users can get the accurate late fee after statement generation.

You can send an eForm without assigning it [112171]

We corrected this so the **Send** button is disabled if there are any unassigned forms. The **Send** button is enabled only when all forms are assigned to the selected recipient.

Customers saying they aren't getting the 2 day eForm reminder [110280]

We resolved this issue so reminder emails are sent as expected.

Spontaneously being logged out [00110907, 110932, 112999]

We fixed an issue reported by users being logged out without warning when they had multiple tabs open.

Form notes 113797

For proposals and invoices, we fixed an issue where the added line spaces in notes did not print out as displayed.

If you go to proposals then try to filter created by it populates with non-relevant data [114482]

We changed this to use only the dealer's non customer users.

Multiple issues with Managely: stopped working while running RMR [114926]

To resolve the issue of Managely becoming slow or unresponsive while processing RMR, we improved the speed of RMR runs.

Accounting reports are incomplete [114585]

We removed the default branch selection from all reports.

Unapplied payments error [114838]

We resolved issues that were causing errors when trying to apply multiple payments to invoices.

RMR generating [115174]

We fixed an issue where RMR would complete but would not show any invoices.