Managely Release Notes

November 2024

Version 5.3.42

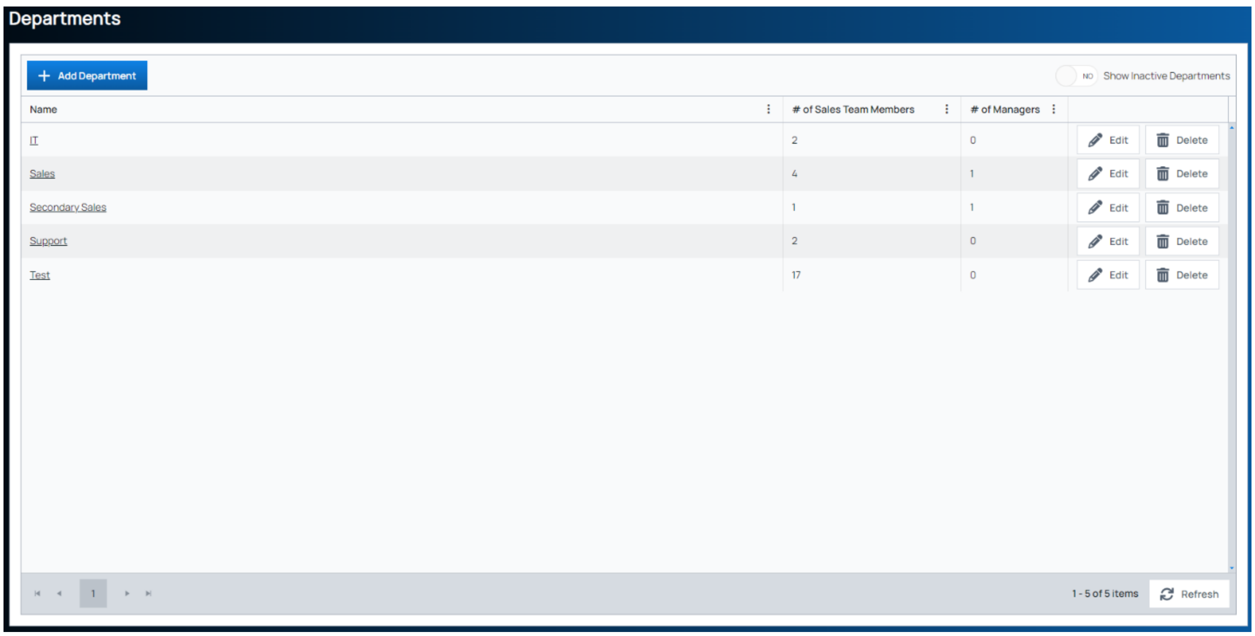
Contents

Enhancements

Proposals, Departments, and Approval Rules

Departments

We added a Departments page (CRM > Departments) to use with approval rules and proposals. Use this page to create, edit, and delete departments, and add and remove salespeople, managers, and approvers to the departments.

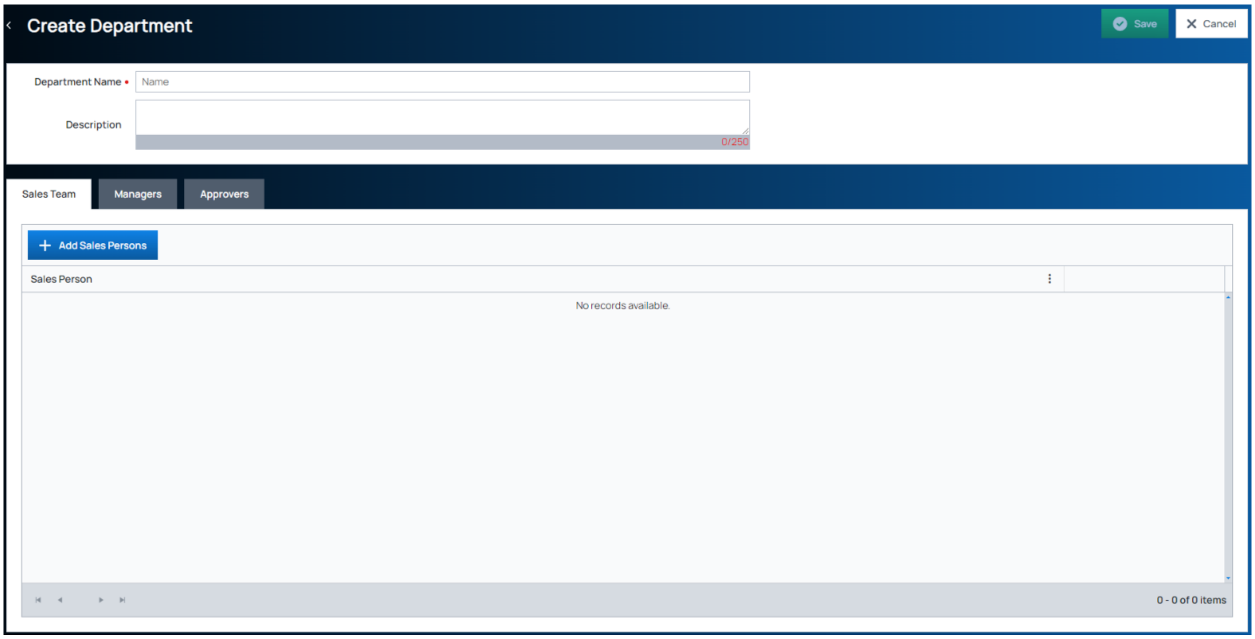


In the grid, columns show the department name, number of salespeople in the department, and the number of managers. There is an Edit button and Delete button in each row to change or delete the department.

Note: Deleting a department that has salespeople makes it inactive (users can reactivate it later). Deleting a department that has no salespeople deletes the department.

How to Add a Department

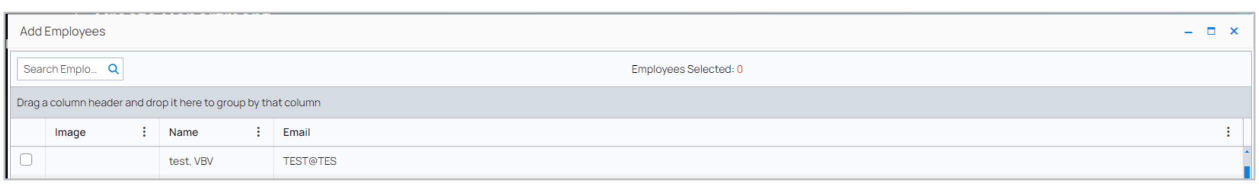
Click the **Add Department** button.



Type a **Department Name**. (Required)

Type a **Description** for the department.

On the Sales Team tab, click the **Add Sales Persons** button. This opens a popup showing all employees who are linked to users.

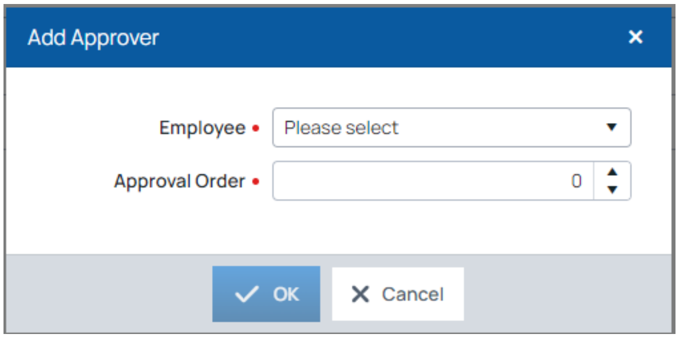


Select the checkbox at the left of each row for each employee. When finished, click the **Add Employees** button at the bottom.

On the Managers tab, click the **Add Managers** button. This opens a popup shows employees who can be selected as a manager. These are employees who are linked to an Admin user.

Select the checkbox at the left of each row, for each employee. When finished, click the **Add Employees** button at the bottom.

On the Approvers tab, click the **Add Approver** button. This opens a popup to select proposal approvers:



Select an **Employee** to be a proposal approver. (Required) This is an employee who is a salesperson that is linked to a user.

Select an **Approval Order** for the employee. (1 for the first approver, 2 for the second approver, etc.) (Required)

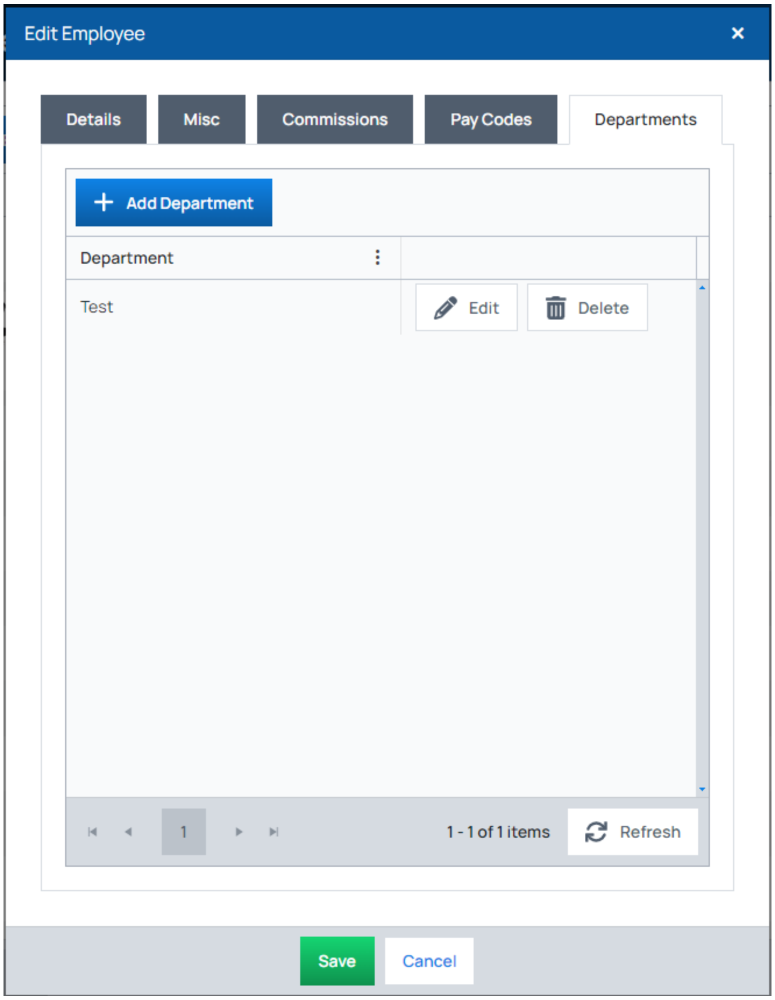
Click **OK** when finished.

Choose as many approvers as needed.

When finished with the Sales Team tab, the Managers tab, and the Approvers tab, save the department (click the **Save** button near the top right corner of the page).

Department Linking from Edit Employees

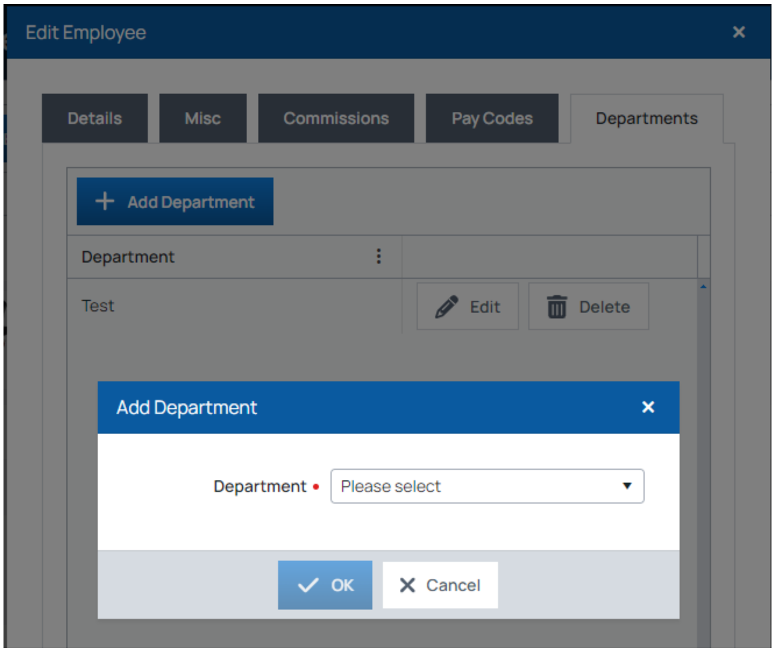
The Edit Employee form (Setup > Company > Employees) now has a Departments tab.



Use this to add, edit (change), or delete a department for the employee.

TIP: Changing the size of the Department column can change the width of the Edit Employee form.

Click the **Add Department** button to open the Add Department popup and select a department from the dropdown field. If there are no departments, this dropdown will be blank. Click **OK** to add the department to the employee.



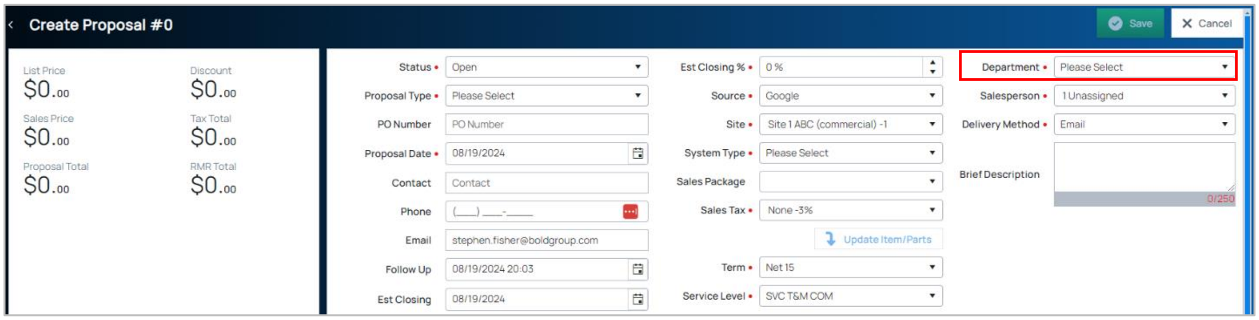
Editing a department functions the same way.

An employee can be part of more than one department.

Use the Department tab on the Edit Employee form to add departments to an employee one at a time. Use the Departments page (CRM > Departments) to add a single or multiple employees to a department at a time.

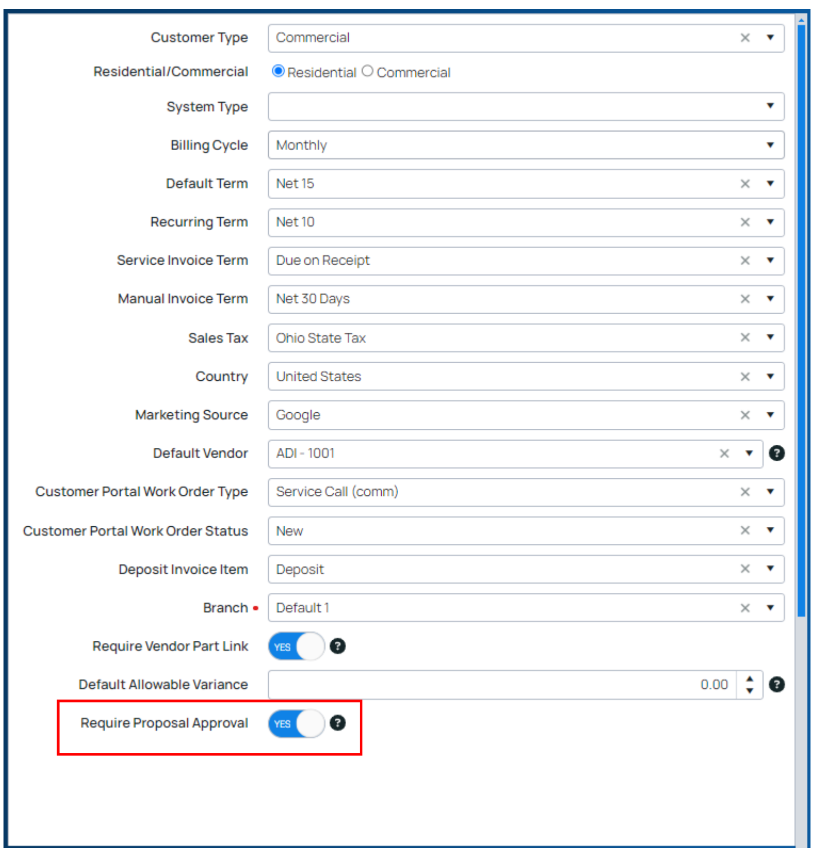
Department Linking for Proposals

On the Proposals page (CRM > Proposals), we added the **Department** field. Use this to link the proposal to a department. Proposals linked to a department that has an approval rule will go through the approval rule process.



Configure Proposal Approval Feature in Setup

On the System Defaults page (Setup > Company > System Defaults) we added a switch called **Require Proposal Approval**:



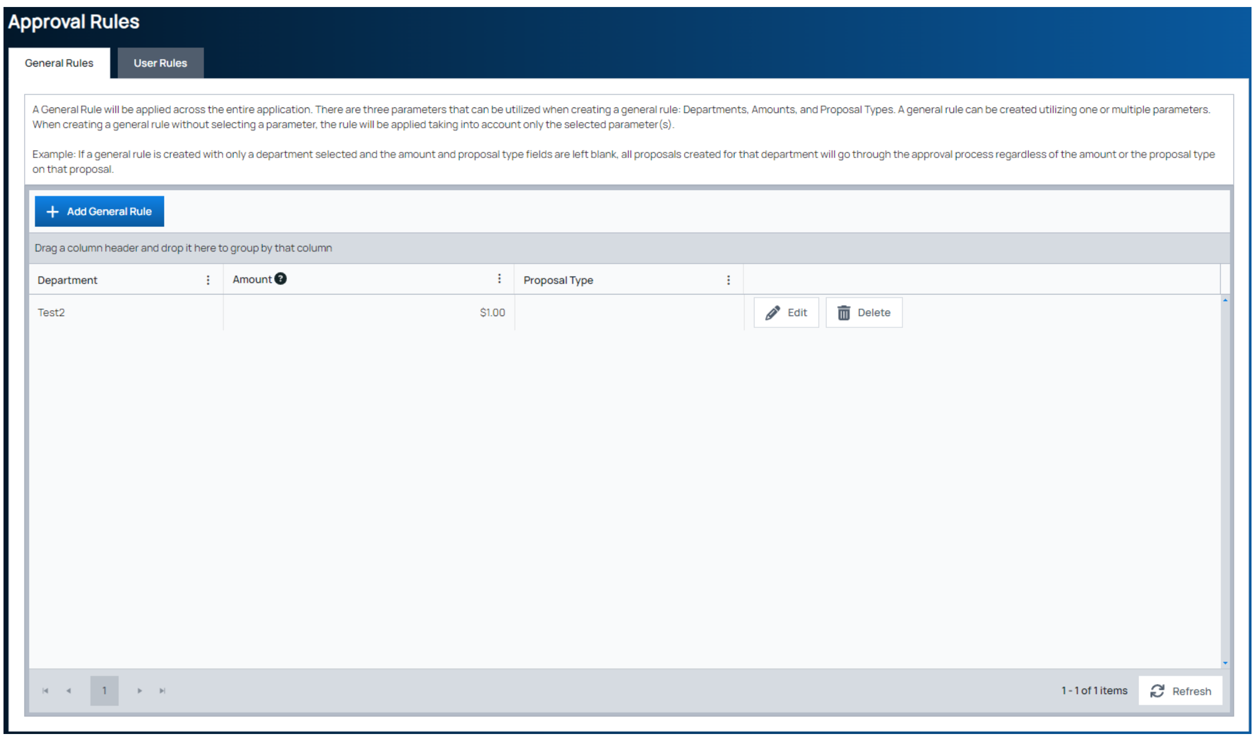
Set this switch to YES to use the proposal approval feature. Do not change this to NO if any proposals are pending approval; the edit button on the proposals will be disabled, and no one will be able to edit those proposals.

Proposal Approval Rules

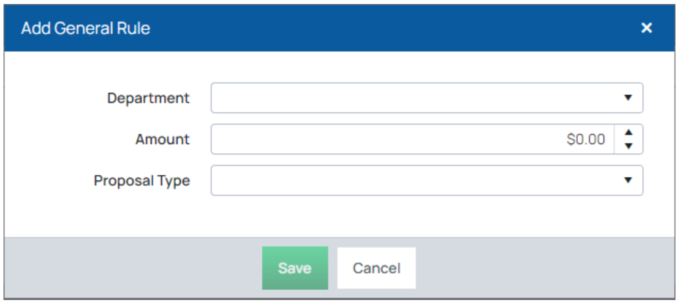
We added a page for proposal approval rules. Use this to define and maintain roles for approving proposals. There are two types of approval roles: general rules and user rules. General rules apply to all users company wide. User rules apply to specific users.

General Rules

1. To add a general rule, browse to the Approval Rules page. (Setup > Proposals > Approval Rules)



2. Click the **Add General Rule** button to open the Add General Rule form.



3. Select any combination of parameters for the rule:

NOTE: If you select two parameters, then both must be met for a proposal to follow the rule; if you select three, then all three must be met for a proposal to follow the rule.

Department: Any proposal created for this department will go through the approval process. These come from CRM > Departments.

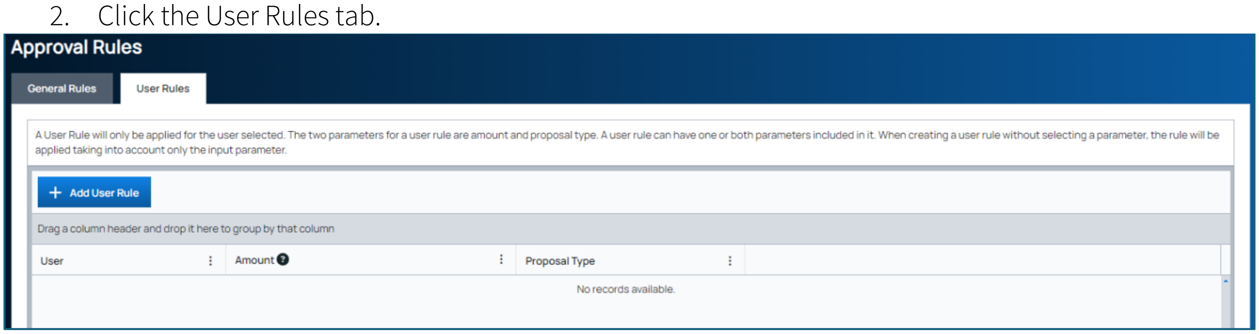
Amount: Any proposal created that is more than this amount will go through the approval process.

Proposal Type: Any proposal with this type will go through the approval process. (Proposal types are defined on the Proposal Types page (Setup > Proposals > Proposal Types), and the proposal type is selected on the proposal.)

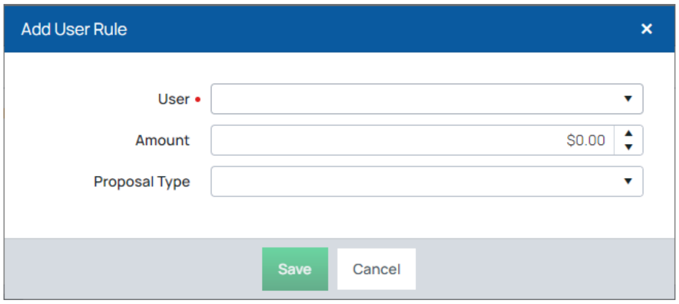
4. When finished, click **Save**.

User Rules

1. To add a user rule, browse to the Approval Rules page. (Setup > Proposals > Approval Rules)
2. Click the User Rules tab.



3. Click the **Add User Rule** button to open the Add User Rule form.



4. Select any combination of parameters for the rule:

NOTE: If you select two parameters, then both must be met for a proposal to follow the rule; if you select three, then all three must be met for a proposal to follow the rule.

User: Any proposal created for this user will go through the approval process; these are uses with the salesperson role.

Amount: Any proposal created that is more than this amount will go through the approval process.

Proposal Type: Any proposal with this type will go through the approval process. (Proposal types are defined on the Proposal Types page (Setup > Proposals > Proposal Types), and the proposal type is selected on the proposal.)

5. When finished, click **Save**.

Approval Rule Maintenance

In the grid for general rules and user rules, there is an Edit button and Delete button. Use these to maintain approval rules.

Submit Proposal for Approval

Users can submit proposals for approval when the proposals follow approval rules. This is the general proposal approval process:

Setup

- Turn on proposal approval: System Defaults > **Require Proposal Approval** = YES (Do not set this to NO if any proposals are pending approval; the edit button on the proposals will be disabled, and no one will be able to edit the proposal.)
- Set up departments: CRM > Departments (Departments must have one or more approvers for a proposal to go through approval process. Only administrators can set up departments.)
- Add proposal rules: Setup > Proposal > Approval Rules (Only administrators can set up approval rules.)

Proposal Creation and Approval

- A user creates a proposal that matches the condition(s) in an approval rule (proposal type/department/amount) and saves proposal.
- The proposal creator clicks the **Submit for Approval** button. There is a prompt: Are you sure you want to submit this proposal? You will no longer be able to edit this proposal until it is either approved or declined. Click **Yes**.
- The Proposal status is restricted while pending approval; the proposal creator cannot change the status to sold or closed.
  - The first approver gets an email about proposal approval.
    - The first approver logs into Managely.
    - The first approver can see proposals pending approval in the CRM > Proposals > Approval Queue tab (this tab shows only proposals that the first approver can approve. Admin users can see all proposals pending approval. Admin users can approve proposals on behalf of an approver.)
      - There are three ways for an approver to get to a proposal to review: link in the email; Approval Queue tab review button; open the proposal from the list.
    - On the Proposal page, the first approver sees these buttons: Accept or Decline.
    - If the first approver declines the proposal: (the second approver, if there is one, does not get an email about proposal approval)
      - The approver enters a reason for declining.
      - An email goes to the proposal creator about the declined proposal.
      - The proposal creator logs into Managely.

- On the Proposal page, the proposal creator sees the reason the proposal was declined (top left, proposal shows Needs Revision).
- The proposal creator edits the proposal and submits the proposal for approval again.
- The first approver gets an email about proposal approval.
- The approver logs into Managely.
- On the Proposal page, the approver sees these buttons: Accept or Decline.

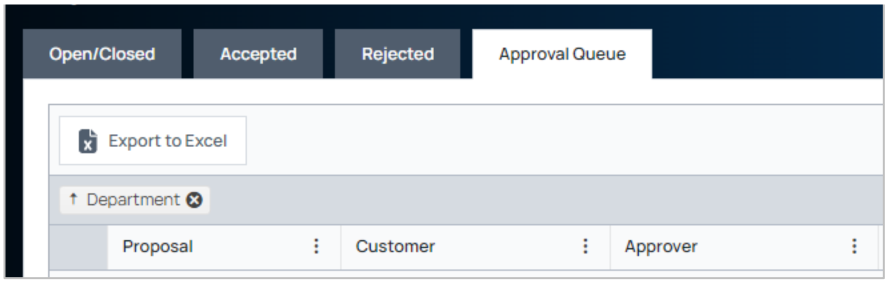
- If the first approver accepts proposal:
  - There is a message showing the proposal has been accepted and the proposal closes.

- The second approver (if there is one) gets an email about proposal approval.
  - The second approver logs into Managely.
  - The second approver can see proposals pending approval in the CRM > Proposals > Approval Queue tab (this tab shows only proposals that the second approver can approve.)
  - On the Proposal page, the second approver sees these buttons: Accept or Decline.
  - If the second approver accepts the proposal, the proposal creator gets an email stating proposal has been approved. (The proposal shows Finalize and Complete Proposal button.)

- The proposal creator goes to the proposal detail screen and can click **Finalize and Complete Proposal** button or edit the proposal and send it through the approval process again.

New Approval Queue Tab on Proposals Page

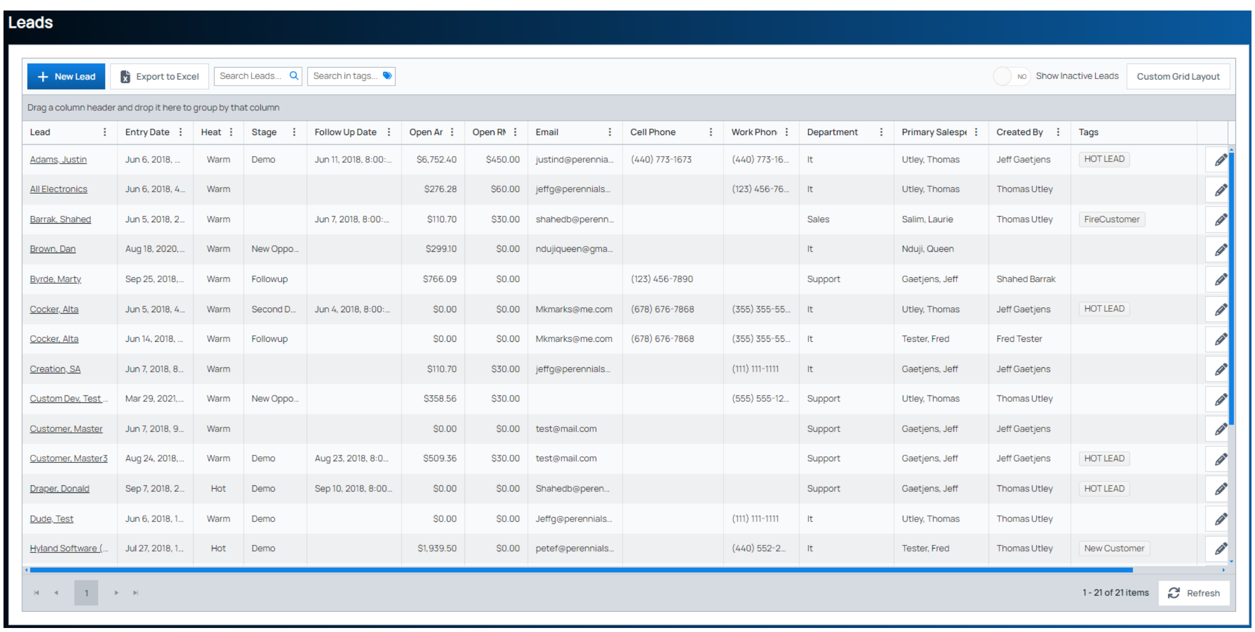
When using the proposal approval process, admin users and users who are selected as proposal approvers (in approval rules) will see the Approval Queue tab:



Proposal approvers will see the proposals they are able to review and approve. Admin users will see all proposals that have been submitted for review.

Lead Management

We added lead management functionality. This includes the ability to create and edit leads that have basic contact information (such as name, address, phone number(s), etc.); the overall disposition of the lead; stage of the sales opportunity associated with the lead; source of the lead; notes; documents; contacts; and a follow-up date for tracking the next action item. To find the Leads page, navigate to CRM > Leads.

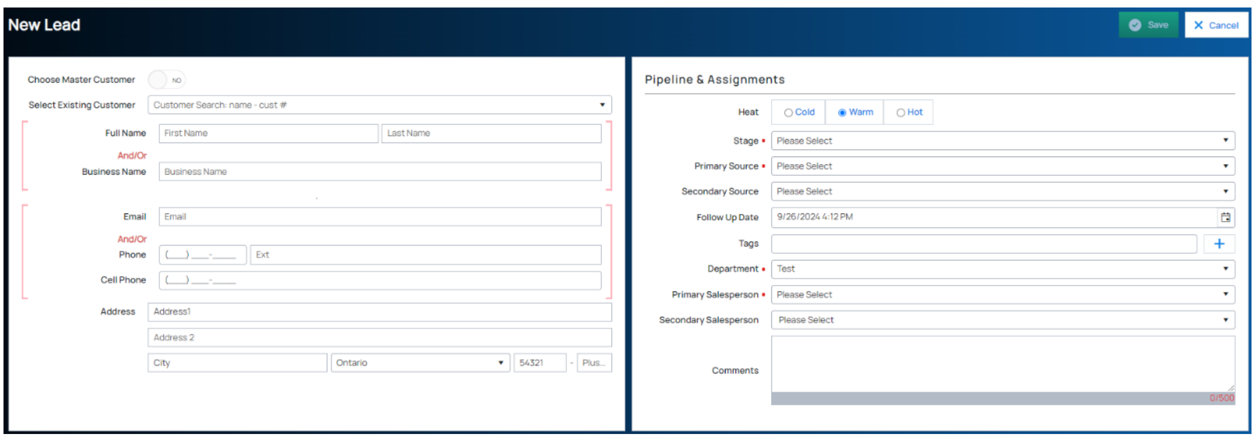


Lead	Entry Date	Heat	Stage	Follow Up Date	Open Ar	Open RN	Email	Cell Phone	Work Phon	Department	Primary Salesp	Created By	Tags
Adams, Justin	Jun 6, 2018, ...	Warm	Demo	Jun 11, 2018, 8:00:...	$6,752.40	$450.00	justind@perennia...	(440) 773-1673	(440) 773-16...	It	Utley, Thomas	Jeff Gaetjens	HOT LEAD
All Electronics	Jun 6, 2018, 4...	Warm			$276.28	$60.00	jeffg@perennials...		(123) 456-76...	It	Utley, Thomas	Thomas Utley	
Barrak, Shahed	Jun 5, 2018, 2...	Warm		Jun 7, 2018, 8:00:...	$110.70	$30.00	shahedb@perenn...			Sales	Salim, Laurie	Thomas Utley	FireCustomer
Brown, Dan	Aug 18, 2020,...	Warm	New Oppo...		$299.10	$0.00	ndujiqueen@gma...			It	Nduji, Queen		
Byrde, Marty	Sep 25, 2018,...	Warm	Followup		$766.09	$0.00		(123) 456-7890		Support	Gaetjens, Jeff	Shahed Barrak	
Cocker, Alta	Jun 5, 2018, 4...	Warm	Second D...	Jun 4, 2018, 8:00:...	$0.00	$0.00	Mkmarks@me.com	(678) 676-7868	(355) 355-55...	It	Utley, Thomas	Jeff Gaetjens	HOT LEAD
Cocker, Alta	Jun 14, 2018, ...	Warm	Followup		$0.00	$0.00	Mkmarks@me.com	(678) 676-7868	(355) 355-55...	It	Tester, Fred	Fred Tester	
Creation, SA	Jun 7, 2018, 8...	Warm			$110.70	$30.00	jeffg@perennials...		(111) 111-1111	It	Gaetjens, Jeff	Jeff Gaetjens	
Custom Dev, Test ...	Mar 29, 2021,...	Warm	New Oppo...		$358.56	$30.00			(555) 555-12...	Support	Utley, Thomas	Thomas Utley	
Customer, Master	Jun 7, 2018, 9...	Warm			$0.00	$0.00	test@mail.com			Support	Gaetjens, Jeff	Jeff Gaetjens	
Customer, Master3	Aug 24, 2018,...	Warm	Demo	Aug 23, 2018, 8:0...	$509.36	$30.00	test@mail.com			Support	Gaetjens, Jeff	Jeff Gaetjens	HOT LEAD
Draper, Donald	Sep 7, 2018, 2...	Hot	Demo	Sep 10, 2018, 8:00...	$0.00	$0.00	Shahedb@peren...			Support	Gaetjens, Jeff	Thomas Utley	HOT LEAD
Dude, Test	Jun 6, 2018, 1...	Warm	Demo		$0.00	$0.00	Jeffg@perennials...		(111) 111-1111	It	Utley, Thomas	Thomas Utley	
Hyland Software (...	Jul 27, 2018, 1...	Hot	Demo		$1,939.50	$0.00	petef@perennials...		(440) 552-2...	It	Tester, Fred	Thomas Utley	New Customer

To create a new lead, click the **New Lead** button. To open an existing lead, click the hyperlink in the Lead column in the grid. Creating a lead saves the lead as a prospect, which is visible on the Customers page (CRM > Customers). Prospective customers show the label Prospect in the top left corner. When a prospect accepts a proposal by signing and accepting an eForm or when a user changes the proposal to sold, Managely changes the prospect status to Normal Customer.

If a prospect rejects a proposal, Managely changes the prospect status to terminated. This is also shown in the top left corner. (Users can see terminated customers on the Customers page by clicking the Terminated Customers switch to YES.) If a proposal status is changed to rejected, the prospective customer status is also set to terminated.

New Lead Page



When entering a new lead, enter or choose this information:

Choose an existing master customer or an existing customer. If the lead is not for an existing customer, type these details: First name and Last name or Business name (or both); Email address or Phone number (or both).

Address: If you choose an existing customer, the address fills in automatically from the customer record.

Heat: Choose the interest the lead has in purchasing your company's service or product.

*__Stage__: Choose a stage for the lead. These come from Setup > Lead Setup > Lead Stages.

*__Primary Source__: This is the origin of the lead. These come from Setup > Proposals > Marketing Sources > Primary Marketing Sources tab.

Secondary Source: These come from Setup > Proposals > Marketing Sources > Secondary Marketing Sources tab.

Follow Up Date: Select a date to follow up on the lead.

Tags: Choose an existing tag for the lead (these come from Setup > Operations > Tags) or click the plus beside the field to add a tag.

*__Department__: This shows all active departments. These come from CRM > Departments.

*__Primary Salesperson__: These come from the salespeople on the selected Department.

Secondary Salesperson: These are salespeople who are marked as a salesperson in the Employees list (Setup > Company > Employees).

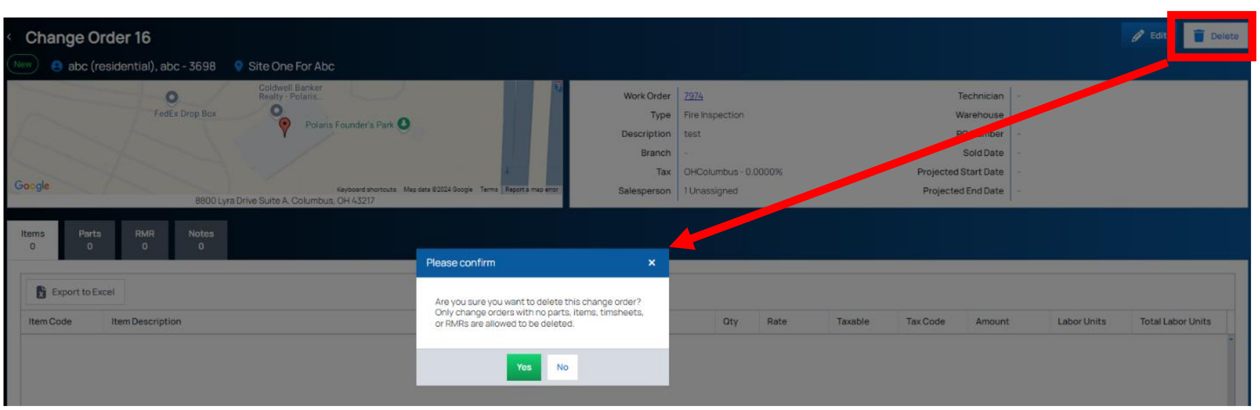
Comments: This is a free field for comments and notes.

Add Part Long Description to Part Uploader [106570]

On the Parts Uploader, we added a column for the Long Description. To see this, navigate to Setup > Uploaders > Parts Uploader. Click Download Template. This is an Excel spreadsheet.

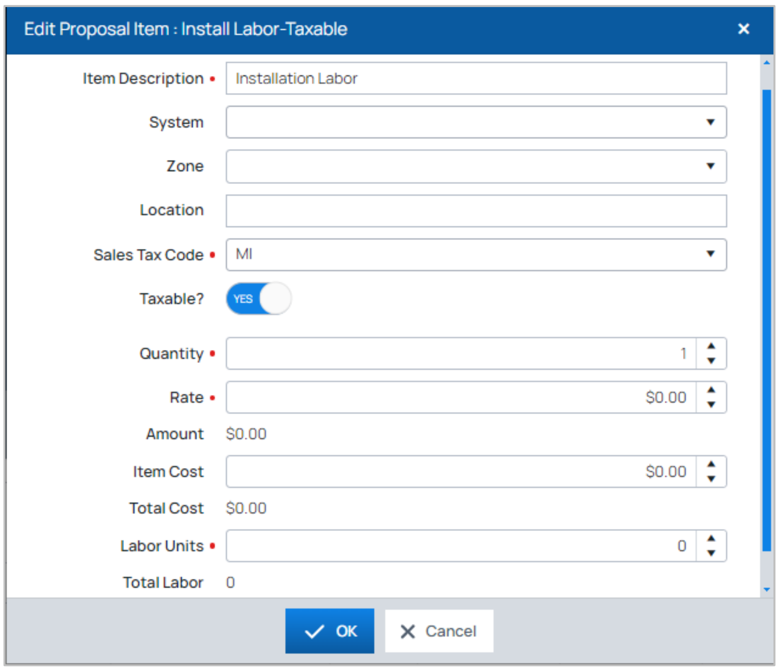
Ability to Delete "Open" Change Orders

On the Change Order details page, we added a **Delete** button, so users can delete certain change orders. Users can delete change orders that have no items, parts, timesheets, or RMR, and if they have a work order status of open. If addition, any change order commissions on it must have total amount = 0; these will also be deleted with the change order.



Ad-hoc Cost Edit on Proposal Item [116802]

For proposals, we made a change to allow editing the item cost. Also, we added the zone and location fields in work order items and proposal items.



Purchase Order Status Changes on Delivery [116908]

The status of purchase orders did not change even after it was submitted. We updated the purchase order page to check for a submitted date, and if the purchase order has not been resolved, the status displays as submitted. This is visible on the purchase order detail page (Accounts Payable > Purchase Orders > PO# hyperlink).

Customer Manager “Add” Permission Supports Edits to Customer Portal Users [118552]

We modified the role for Customer Manager Add, so that users with this role can also reset the passwords for customer users. This is the permission:

This is on the Add/Edit User form (Setup > Company > User Manager).

Added Branch Selection to Standard Reports for Accounts Receivable and Accounts Payable

We added Branch as an option to the Order By field to all the reports listed below. This allows users to order reports by branch. Each report also shows the branch name in a column.

<u>Accounts Receivable</u>

- AR Aging Report
- Credit Reasons Report
- Detailed Deposits
- Funded Transactions
- Invoice/Credit Register

<u>Accounts Payable</u>

- AP Aging Report

Added Branch Selection to Standard Accounting Reports

We changed these reports:

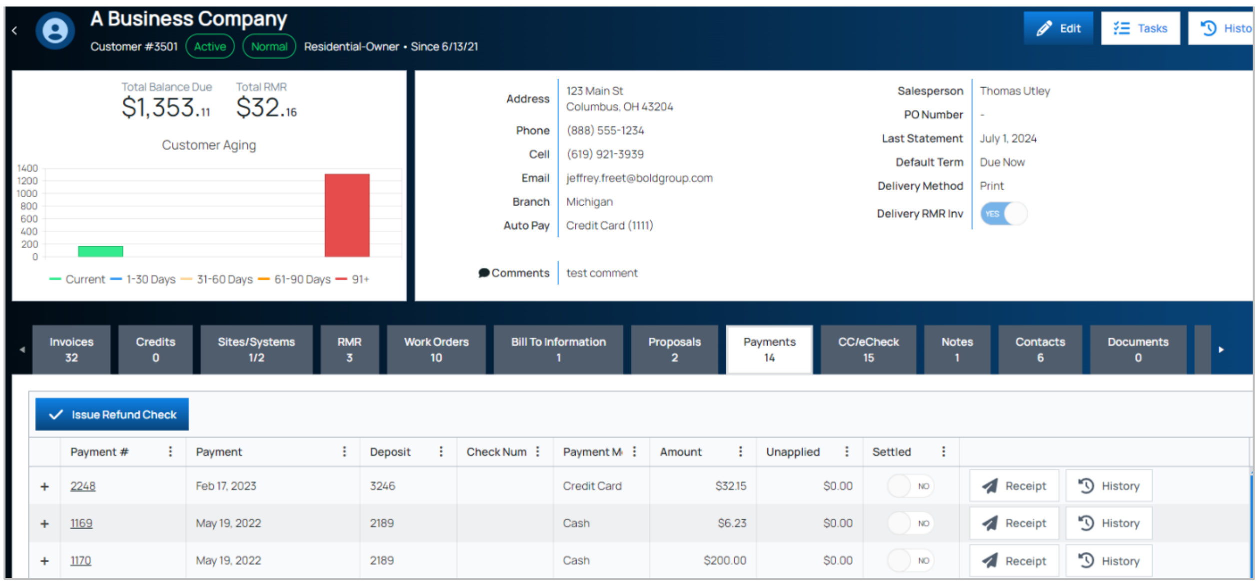
- Added a Branch selector for the Comparison Balance Sheet, GL Posting, and Comparison Profit & Loss Report
- Added a Branch selector and included the branch name in the GL Posting Report
- Added an Order by and a Branch selector and included the branch name and customer name in the Work Order Revenue Report

Added Branch as a Column to the GL Register Grid [118305]

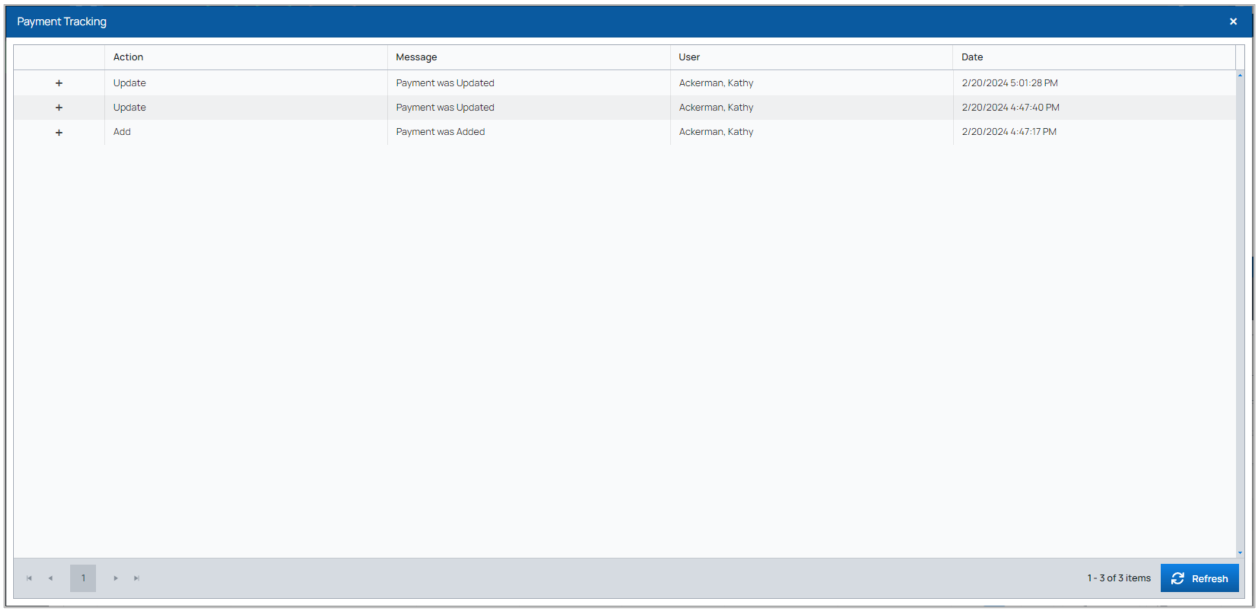
We added the Branch column to the grid on the General Journal Entry page (GL > GL Register > click Add General Journal Entry button > General Journal Entry page) and to the grid on the GL Account page (GL > Chart of Accounts > Account Number hyperlink > GL Account page).

Added History for All Payment Types on Customer History [117776]

We added a button for history tracking to the Customer Payments grid:



Clicking this button opens a window showing the payment history:



Enhanced Clarity and Business Rules on Existing Invoice Item

For users managing invoice items, we added better descriptions and improved the user interface to enforce the options for invoice items making sure they are created properly for deferred and non-deferred revenue.

We made these changes for adding and editing items (Setup > Items & Parts > Items):

- Renamed "Is Commissionable?" to "Commissionable?"
- Renamed "Taxable" to "Taxable?"
- Renamed "Recurring Item" to "Recurring?" If this is set to NO, then Deferred? is also set to NO. If this is set to YES, then Deferred? is also set to YES.
- Renamed "Non-Deferred" to "Deferred?" The default is YES, and if the Deferred Income account is empty, it defaults to the account from the Company > Preferences > GL Account tab > Deferred RMR Income field.

We removed the restriction that prevented users from adding items to RMR invoices that were not marked as Recurring? = YES.

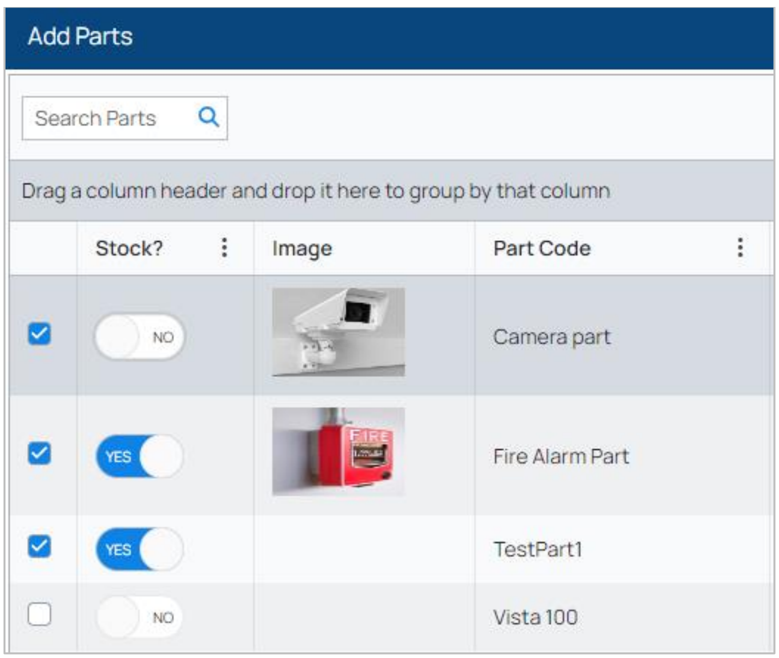
Finally, all active items are now available in the Item dropdown list in the RMR form accessed from these places:

- CRM > Customers > Customer Details > RMR tab > New RMR
- CRM > Customers > Add Customer > last step of wizard under RMR
- Accounts Receivable > RMR > RMR Details > Edit

Ability to Flag Parts Coming from Stock Versus Direct Expense [00118830]

Note: For existing work order parts, this new functionality will not change parts to be Stock or non-Stock. Users will be able to issue or order the parts. Users can edit parts on the work order and set the Stock switch to YES or NO. Doing that will enable functionality specific for stocked or non-stock parts added by this feature.

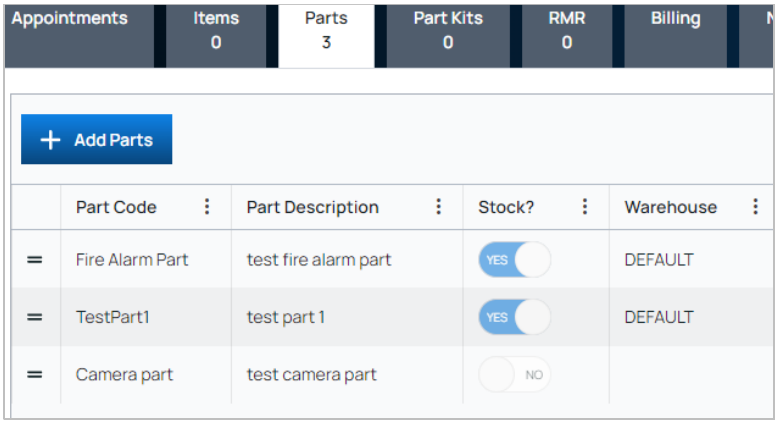
For work orders, when users add work order parts, the part picker now shows a **Stock?** switch. User can set this to YES or NO:



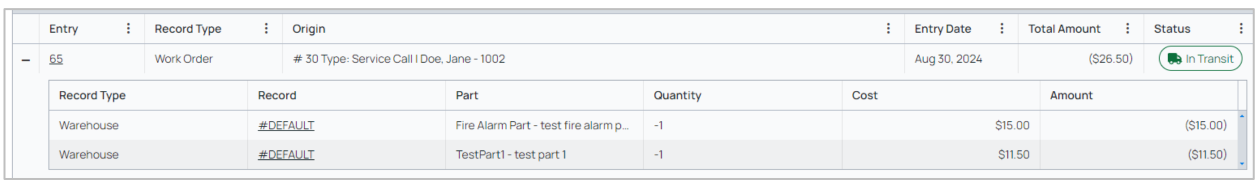
This switch indicates if a part is stocked in a warehouse or not. By default, the switch is YES, which means it is a stocked part. Stocked parts have a warehouse and are issued from that warehouse's available stock.

If the switch is set to NO, it is a non-stocked part and does not have a warehouse. Non-stocked parts are ordered from a direct expense purchase order. These are received (receipt + part issue) into a work order.

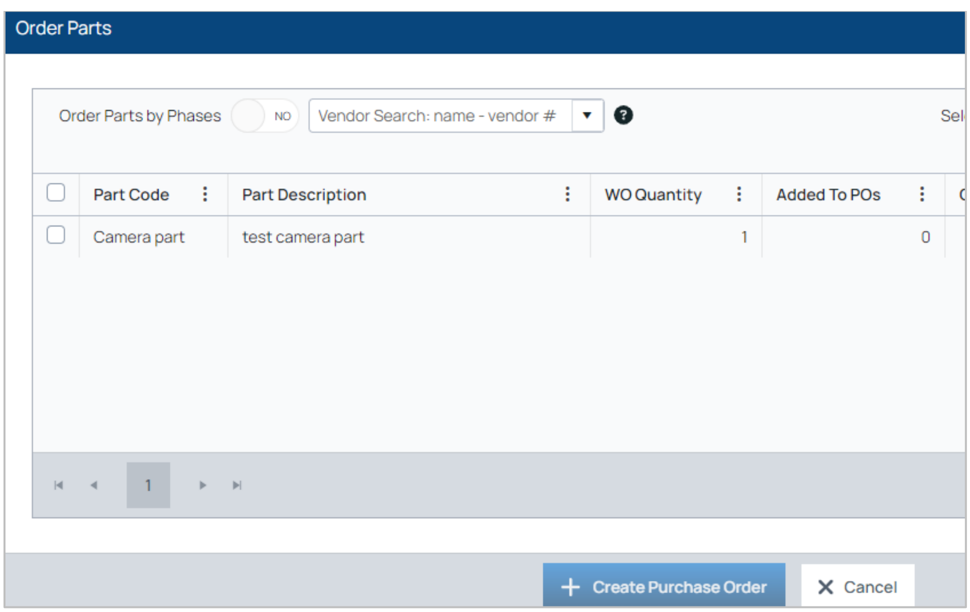
When picked parts are added to a work order, the stocked parts show their warehouse, non-stocked parts do not show a warehouse. This is shown on the Parts tab:



The parts ledger creates records for only stocked parts (non-stocked parts are excluded):



When users create a purchase order for the work order, only non-stocked parts are shown:



After creating a direct expense purchase order for the non-stocked parts and receiving them, Managely creates a part issue that updates the existing work order parts.

Here is an example:

A work order needs 5 cameras and 2 panels. The cameras are stocked in a warehouse and there are enough for the work order. The panels are not stocked. A user adds the cameras to the work order and sets the Stocked switch to YES. The user adds the panels to the work order and sets the Stocked switch to NO. Then the user creates a direct expense purchase order from the work order that includes the 2 panels. When the purchase order is received (the receipt created and the purchase order resolved), the 2 panels are automatically issued to the work order.

Here is another example with a stocked part that does not have enough in the warehouse for the work order:

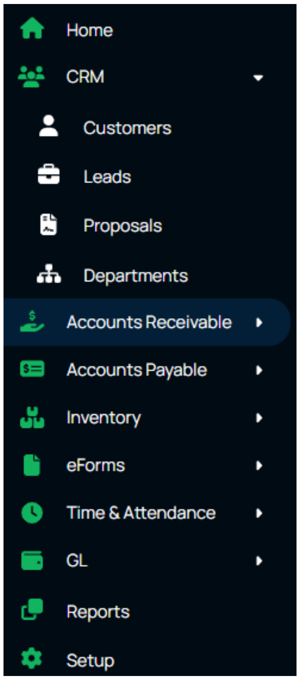
A work order needs 8 cameras. The cameras are stocked in a warehouse, but there are only 5 in the warehouse. A user adds the cameras to the work order and sets the Stocked switch to YES. Then the user adds the cameras to the work order again for the 3 needed, but sets the Stocked switch to NO. The user creates a direct expense purchase order from the work order that includes the 3 cameras needed. When the purchase order is received (the receipt created and the purchase order resolved), the 3 cameras are automatically issued to the work order. If the cameras should be stocked in the warehouse, a user can create a purchase order from the warehouse for the quantity that should normally be stocked.

Added Tracking History for Credit Card and eCheck Transactions [120171]

We added a **History** button to the CC/eCheck Transactions page:

CRM Menu Moved to the Top of the Main Menu [120489]

We moved the CRM menu to the top of the main menu, so it is directly under Home:



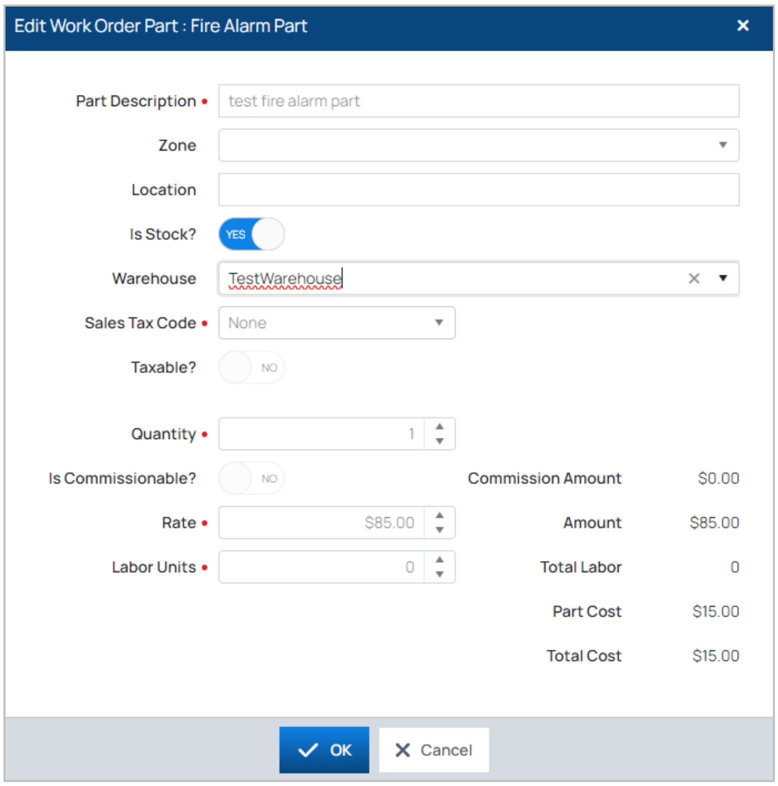
Removed Enterprise Licensing Option

We have simplified our licensing levels so that now there are two: Essentials and Pro. Dealers who were on the Enterprise licensing level will see no change in features. However, their licensing option will now show Pro instead of Enterprise. Dealers who are currently on the Pro licensing level will see some additional features.

BOLD GROUP

Changes for Items for New Stock Capability

When editing work order parts, users can now edit the **Is Stock?** and **Warehouse** fields on work order parts even if the work order is locked (such as when using progress invoicing). (All other fields are still disabled and cannot be changed.)



All work order parts coming from a completed proposal will default to Stock? = YES and use the default warehouse set on the Preferences page (Setup > Company > Preferences > Inventory tab > Main Warehouse field).

The Parts Issue screen (from work order parts issue) will only display stocked parts; non-stocked parts are filtered out automatically.

Application Corrections

GL, Part Ledger, & Inventory not updating on a no cost work order [112717]

When closing work orders flagged as “do not invoice”, Managely was not issuing any remaining unissued parts on the work order. We fixed this to issue remaining parts on completed “do not invoice” work orders.

All selected columns on a grid should include data on export [118075]

Users reported that information in custom fields were not being exported Excel. We resolved this so the Open work orders, Proposals, Sites, and Systems grids that have custom fields displayed will also properly export their values to the Excel spreadsheet.

Error message appears when applying cash to a deposit- however, the cash DOES apply [118832]

We made a change to handle Avalara invoices if the Invoice Total Amount has not been changed.

No option to filter "Prospect customers" in the customer listing

On the customer page (CRM > Customers), users were unable to filter the page by prospect. We added a switch at the top of the grid called **Prospects**. Switch this to YES to see a list of prospects.

Closed receipts are not visible on PO

On the Purchase Order details page on the Receipts grid, we improved the functionality of the Show All Receipts switch. Setting this switch to YES shows all open receipts; receipts that have been closed or converted to a bill; and deleted receipts. This also shows two additional columns in the grid: Is Converted to Bill and Deleted. Setting this switch to NO shows only open receipts that have a total amount over $0 and hides the Is Converted to Bill and Deleted columns.

We changed the Show All Receipts switch to function the same way on the Vendor details page Receipts tab and on the Bills page Receipts tab.

Finally on the grid on the Receipts tab, we added the Last Modified column.

Overview RMR in proposals is not calculating [119198]

When resolving this, we made these changes: added Monitoring Fees to the proposal and fixed the page so that the Net Monthly Total on the proposal overview RMR section is calculated as expected.

"Late Fee Item Code Not Set..." error when generating statement with late fee disabled in settings [119408]

We corrected this so when the **Charge Late Fee?** switch under Setup > Accounting > Statement Rules is set to NO, the error is not generated, even when the **Late Fee Item** is not set in Setup > Company > Preferences > Late Fee tab.

Bill Date Entered Does Not Match Display [119791]

There were some instances of incorrect date/time stamp on bills. We made a change to convert the entry date and bill date to UTC so that it is the same across different time zones.

Error (No Response) when attempting to view linked customer accounts [120188]

When viewing the Accounts tab, the grid would take a long time to load due. This issue was fixed and loading the accounts is quicker.

Error on progress invoicing [121337]

We fixed these issues around Progress Invoicing:

- Deleting a progress invoice no longer gives an error.
- A backend calculation was doubling amounts for multiple items that had the same ID and multiple parts that had the same ID so the calculated total amount for all progress invoices was a higher amount than the work order total amount, which would cause an error.
- Making a change on a work order total amount will recalculate the percentage for all existing progress invoices to verify that the “Invoice Total Amount/Work Order Total Amount” ratio is still valid.

Populate WO#’s on all bill GL entries [121401]

We added Work Order Numbers to Bill GL entries.