Managely Release Notes

December 2024

Version 5.3.43

Contents

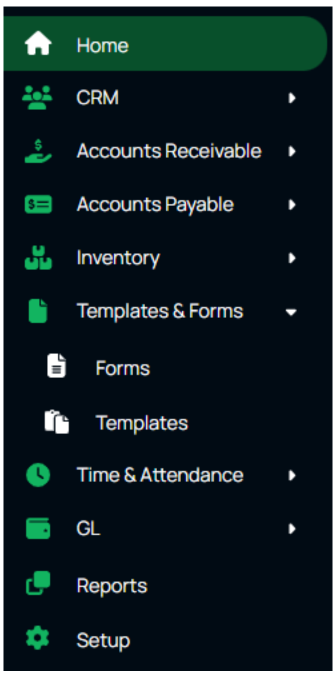
Enhancements

For additional information about the enhancements in the Managely v5.3.43 release and other releases, refer to the Managely Knowledgebase.

Streamlined the Template Navigation

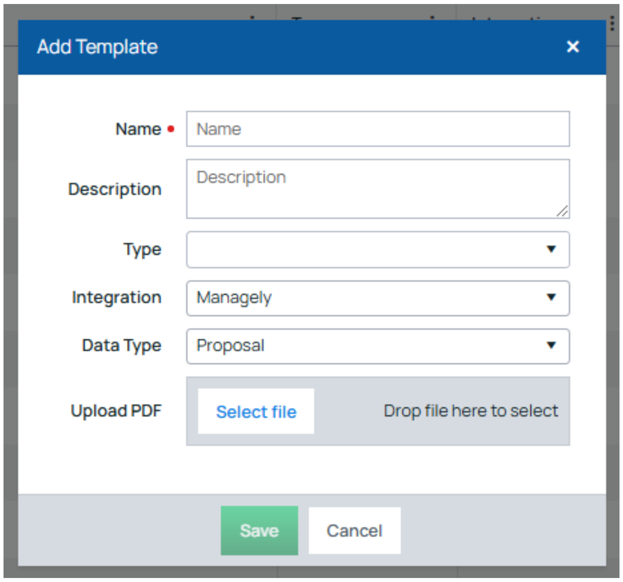
We made several changes to eForm Templates to make it easier to use these features.

1. Renamed the "eForms" top-level menu item to "Templates & Forms":



2. Removed the redundant Templates menu item that was under Setup > Other.
3. Removed the existing Template Engine under Setup > Utilities and moved the functionality under the main menu item Templates & Forms.
   - Included the Default Templates (those that are locked with the only available action being Copy).
   - Added the Sync Default Templates action next to the existing Send Template action.

- On the existing Add Template, added the **Data Type** field:



4. Added Proposal, Contract, and Customer to the list of values available in the **Data Type** field.

Combined Work Order Items and Parts with Change Order Items and Parts on Single Grids

We combined work order items/parts grid records with change orders.

Work Order Total Amounts now include Change Orders

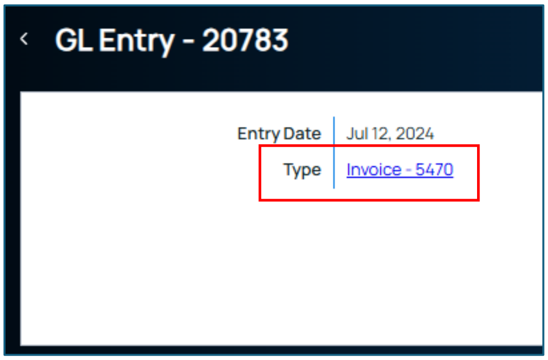
Work order total amounts now include change orders.

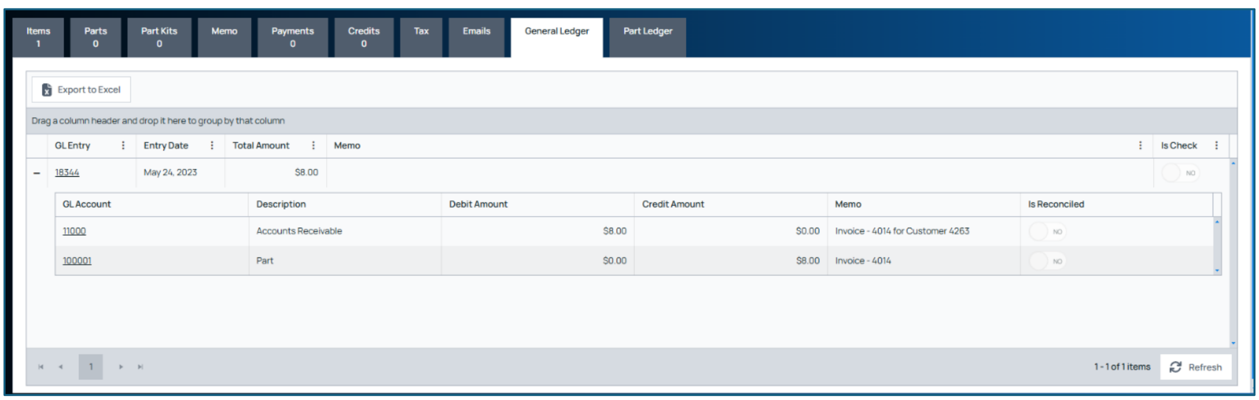
Now Calculating Taxes on Proposals Via Avalara Integration

Managely now calculates taxes on proposals using the Avalara integration as it does for invoices. The default Proposal template includes the tax value(s) as a separate subtotal. These fields are also available in the eForms Template module for custom Proposal document templates.

Improved GL Entry and Invoice Investigations

To help with researching GL issues, we changed the link for invoices so that it opens the invoice in a new browser tab or window (based on browser settings) and focuses on the invoice General Ledger tab:





Improved Mobile Responsive eForms Interface [113728]

We changed the design for eForms, so they are easier to use and more responsive on mobile devices. This improves the formatting so that users can read and edit them more easily.

Added Branch Selection to Standard Reports (Sales)

We changed the following standard reports to have an option of showing transactions or grouping transactions by branch:

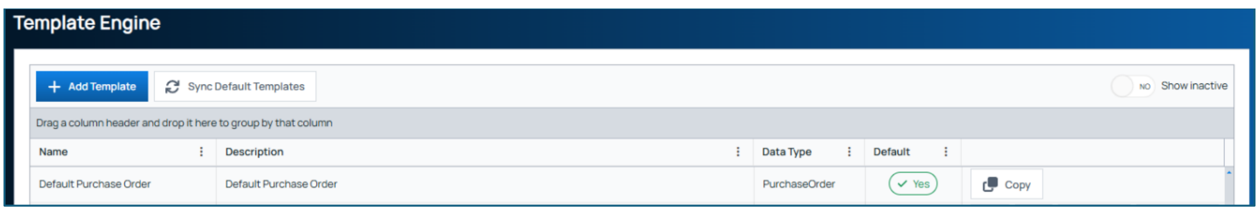
- Customer Sales Report (Reports > Sales)
- Detailed Sales Report (Reports > Sales)
- Current RMR Listing (Reports > Customer)
- Customer Auto Pay (Reports > Customer)

- Customer Listing Report (Reports > Customer)
- Expired Credit Card Report (Reports > Customer)
- Mail/Email Summary (added the Branch as a column in the grids for Outgoing Emails and Outgoing Mails) (Reports > Customer)
- Tech Time Report (Reports > Customer)
- RMR Audit Tracking (Reports > Customer)
- RMR In Force Report (Reports > Customer)
- RMR 12 Month Forward Report (Reports > Customer)
- RMR Increase Trend (Reports > Customer)

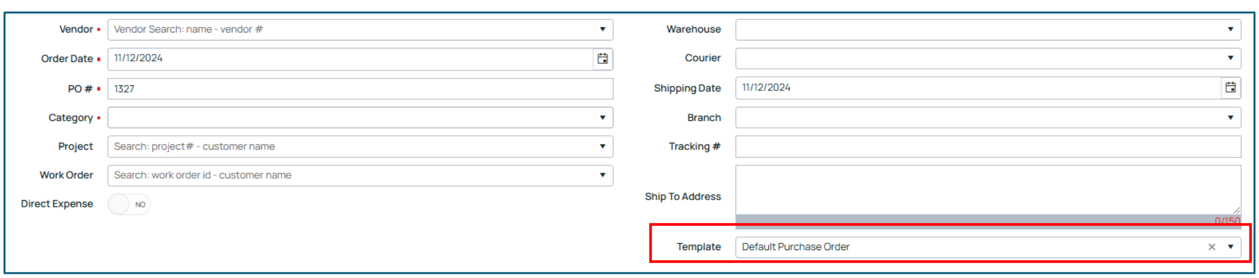
Added Customizable PO eForm Template [116037]

We added a new default template for purchase orders and added a field for choosing the template on the purchase order add/edit page so users can print to a customizable PO template.

On the Templates page (Templates & Forms > Templates), there is a new Default Purchase Order. Users can copy this to create a customized purchase order template.



When adding or editing a purchase order, users will see a new field called Template. This field shows the templates from the Template Engine page.



Delivering a purchase order uses this template to format the purchase order.

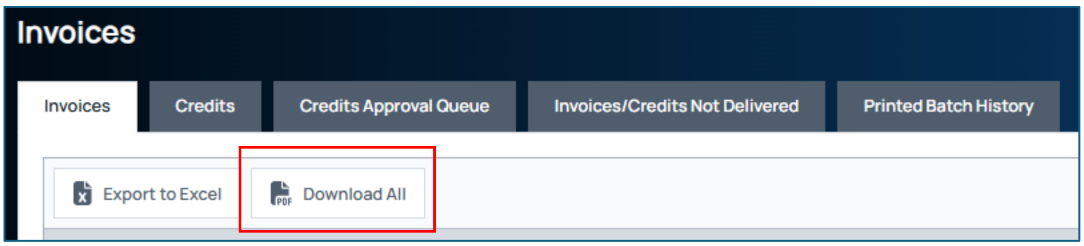
Non-Deferred RMR

Users needed a way to generate non-deferred GL entries for non-deferred RMR items in recurring invoices.

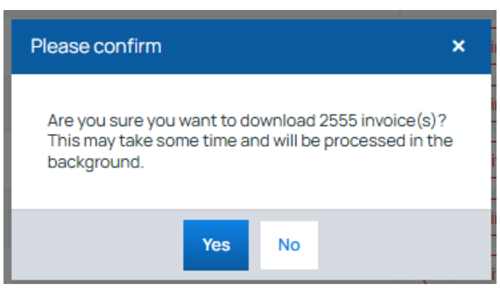
We made a change to allow the immediate realization of revenue in the GL entry for RMR invoices if an RMR item has its Deferred flag set to NO as opposed to how it currently works of realizing the revenue in future deferred GL entries.

Added PDF Export that Combines Invoices on Invoices Grid [119787]

We added a button on the Invoices page (Accounts Receivable > Invoices) for users to download all invoices shown on the grid pages as a PDF file.



When users click the **Download All** button, there is a confirmation message indicating how many invoices will be downloaded. The download runs as a background job; the time it takes to download the invoices depends on the number of invoices. Click **Yes** to continue.



The download includes all invoices on all the grid pages. Filtering the grid by date range or customer can limit the number of invoices shown in the grid, reducing the number of invoices downloaded.

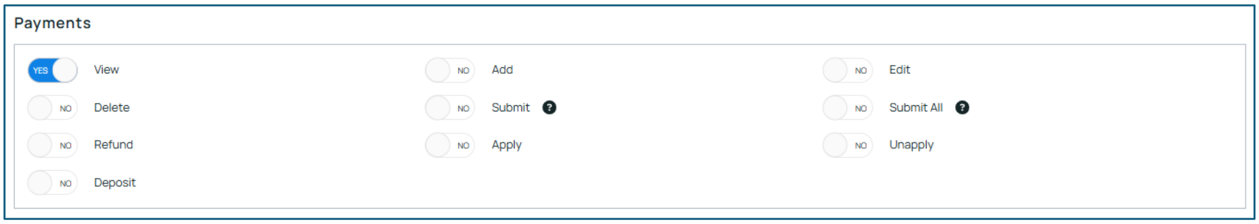
The PDF filename is "Invoices_" followed by the number of invoices downloaded and the date. For example, Invoices_831_2024-12-10 means there are 831 invoices in the file downloaded in 2024 on December 10.

Added Branch to GL Posting Report

We added an option to sort data on the GL Posting Report (Reports > Accounting > GL Posting Report) by branch name. This is an option in the **Order By** field.

Added Permission for Hiding Payment Information on Customer [120675]

On user management permissions (Setup > Company > User Manager), the Payments > View permission now shows or hides the Payments tab on the customer detail page in addition to showing or hiding the Accounts Receivable > Payments menu.



If this is set to YES, users can see the Payments tab on the customer detail page:

If this is set to NO, the Payments tab on the customer detail page is hidden:

Restricting Changes To RMR Generated Invoices

There were issues with adding items to recurring invoices that were not originally part of the RMR generation. The issues were related to GL transactions; editing recurring invoices and adding items ultimately created incorrect GL entries. To avoid this situation, users can no longer edit recurring invoices generated from RMR.

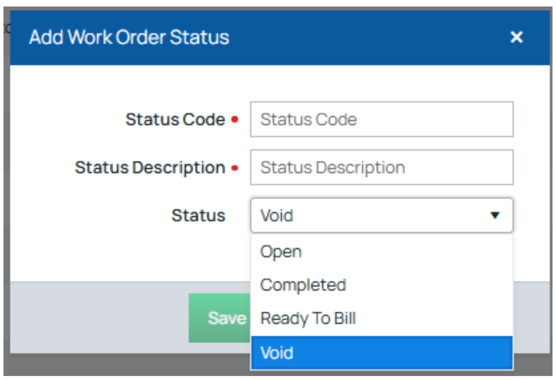
Prevent Editing Delivered Invoices

Managely now prevents users from editing invoices that have been delivered to a customer. If an invoice is changed after delivering it, discrepancies occur between the amounts on the invoice delivered to the customer and what is recorded on the invoice within Managely. Now, when an invoice is delivered, the edit button on the invoice is disabled.

Added Void Status to Work Orders

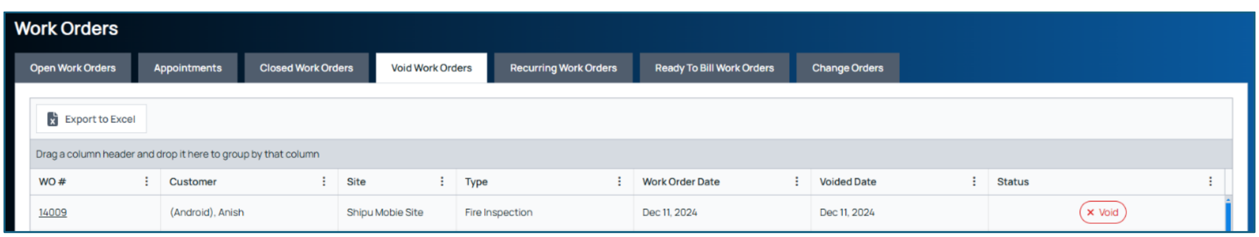
Important: This feature is currently not supported in the mobile app. Using the void status for work orders will cause instability in the mobile app. This mobile app instability will be addressed in a future release.

We added a work order status of void. Users can create a work order status and select the status of void. Open the Work Order page: Setup > Operations > Work Order Status. Click the Add Work Order Status button.

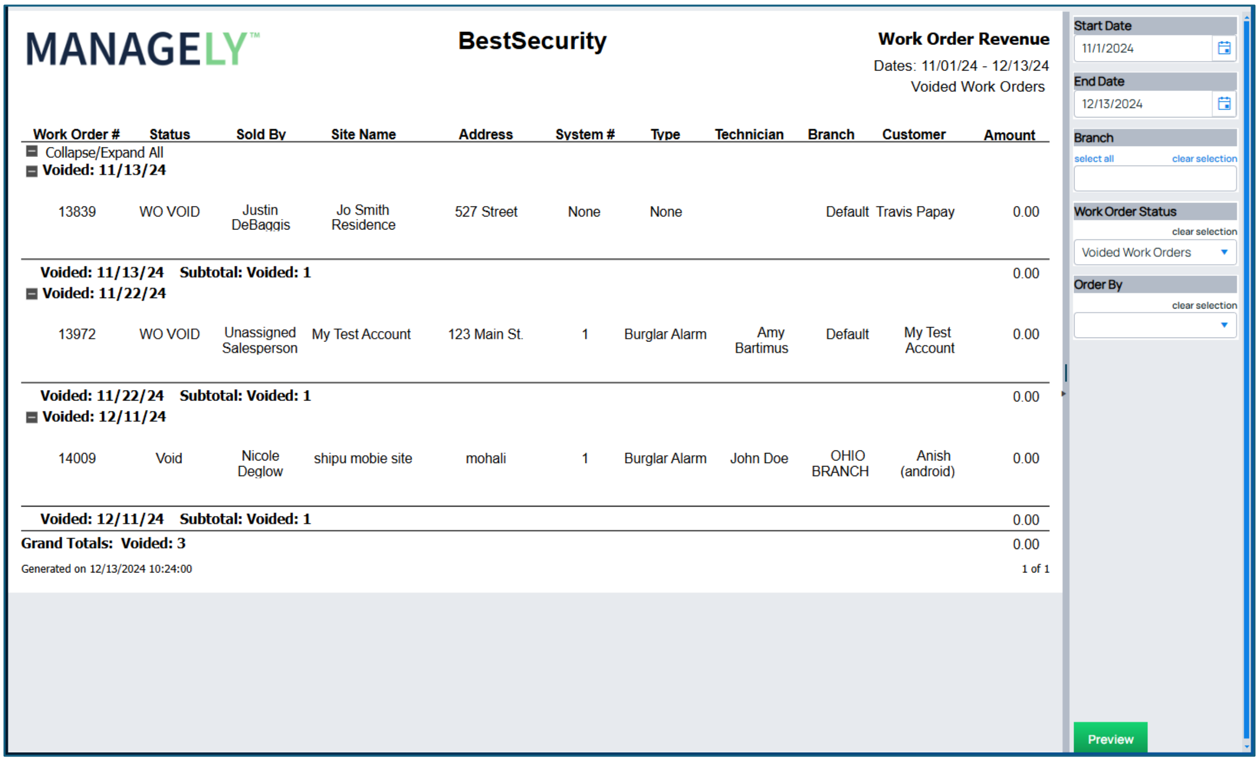


Type a **Status Code**, **Status Description**, and choose Void as the **Status**.

There is a new Void tab on the Work Order page (Accounts Receivable > Work Orders). This shows all work orders that have the void status:



The Work Order Revenue report (Reports > Accounting > Work Order Revenue) has a new option to show voided work orders:



MANAGELY

BestSecurity

Work Order Revenue
Dates: 11/01/24 - 12/13/24
Voided Work Orders

Work Order #	Status	Sold By	Site Name	Address	System #	Type	Technician	Branch	Customer	Amount
Collapse/Expand All										
Voided: 11/13/24										
13839	WO VOID	Justin DeBaggis	Jo Smith Residence	527 Street	None	None		Default	Travis Papay	0.00
Voided: 11/13/24	**Subtotal: Voided: 1**									0.00
Voided: 11/22/24										
13972	WO VOID	Unassigned Salesperson	My Test Account	123 Main St.	1	Burglar Alarm	Amy Bartimus	Default	My Test Account	0.00
Voided: 11/22/24	**Subtotal: Voided: 1**									0.00
Voided: 12/11/24										
14009	Void	Nicole Deglow	shipu mobie site	mohali	1	Burglar Alarm	John Doe	OHIO BRANCH	Anish (android)	0.00
Voided: 12/11/24	**Subtotal: Voided: 1**									0.00
Grand Totals: Voided: 3										0.00

Generated on 12/13/2024 10:24:00 1 of 1

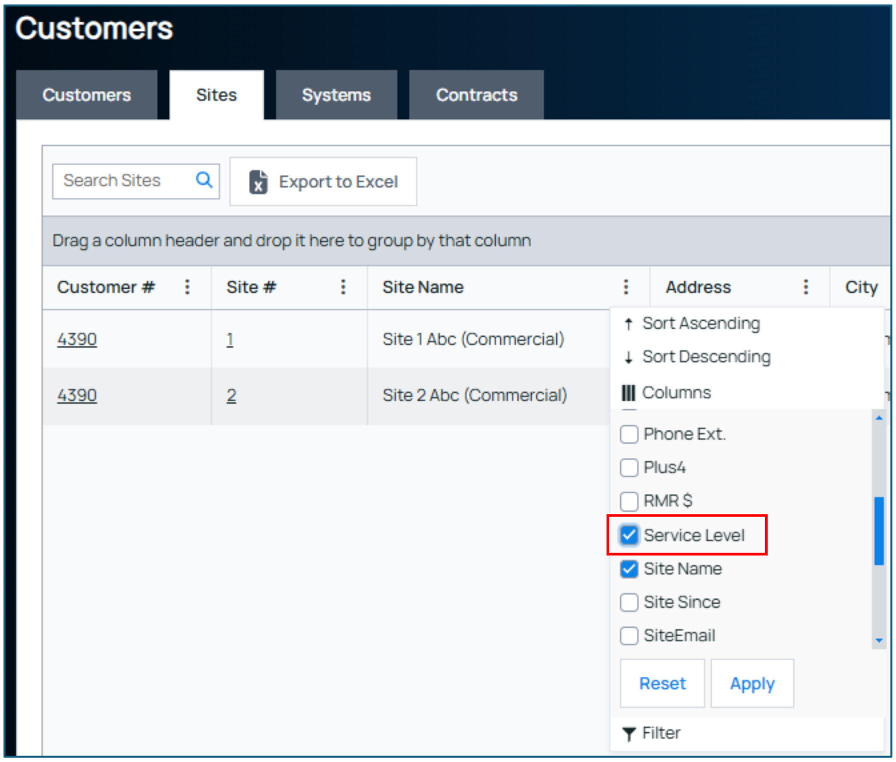
Added Service Level Column on the Sites Grid (Customers > Sites) [124058]

On the Customers page, Sites tab, we added a column called Service Level. Users can add this column to the grid to see the service level for each site and export it to Excel if needed.

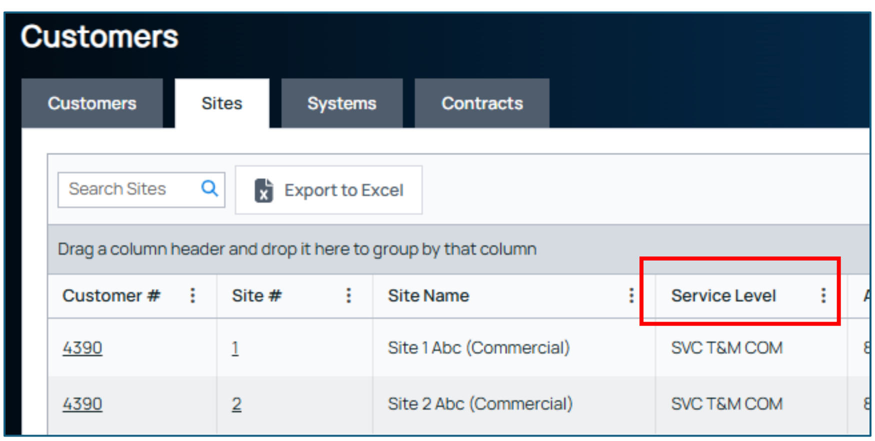
By default, this column is hidden. This is how to add the column to the grid:

1. Click the three dots beside a column name.
2. Click **Columns**. This shows a list of available columns.
3. Scroll down to **Service Level**. Select the checkbox.

4. Click **Apply**.



The option for columns closes. The column is shown in the grid.



Users can sort and group this column like other columns.

Application Corrections

Delivering Bill To [111195]

When the Bill To email address had been changed on an account that was set up with email delivery, the Deliver button on an invoice was not populating the Bill To email address. It was populating the customer email address. Also, statements were not going to the Bill To email address, they were going to the customer email address.

We resolved this issue. On the customer detail page, on the Invoice tab, clicking the Generate Statement button, the default email address is the Bill To address that has the Primary Statement turned on; this is shown on the Edit Billing Information form. If there is no bill to information with the Primary Statement turned on, the customer's email address is the default. If there is no customer email address, the Email field on the Deliver Notification popup is empty.

Opening new tab causes Managely to lose dark theme [119371]

Opening a new tab caused Managely to lose dark theme. Also, on the dark theme the upper right text with the username and sign out was illegible due to its colors. We fixed this so that opening a new tab does not cause the dark theme to be lost and that the upper right text with the username and sign-out options remains legible due to its color contrast.

Username illegible in the upper right corner when using Managely dark theme [119405]

Using the dark theme, the upper right text with the username and sign out were illegible due to its colors. We fixed this so the upper right text with the username and sign-out options remains legible due to its color contrast.

Average & standard cost erroneously combined [117442]

To resolve this, the average costing parts will now match the GL amounts. Previously, the part amounts on a warehouse were calculated by taking cost * qty, but for average cost parts, the cost may not perfectly line up with the Amounts recorded in the ledger. To address this discrepancy, average cost parts will now use the ledger entries to compute their total amount. Note: Any part issues will continue to use average cost * qty to calculate the amount; and any part cost adjustments will continue to make a corresponding GL entry to account for it.

Credit Approval link doesn't take you to the credit that needs approved [119579]

When credit approvers would receive an email to approve a credit, the link in the email would not take users to the credit that required approval. We fixed this issue so that the link directs credit approvers to the credit to approve. We also fixed another issue when users were logged in, they were redirected to login page; after login, the URL to the credit approval page was not working and taking them to Home page.

Customer contacts set for email invoice delivery are not receiving invoices [120621]

Previously, customer contacts would only get the email when the options were checked (toggles set on the contact with a valid email address) AND that the invoice was delivered via email (contacts would be included in the email CC field). With this change, customer contacts will also get an email when the invoice is mailed. Contacts will be listed as recipients on the email.

Print check on check GL detail amount total is double [121276]

We resolved an issue that would double refunds when users printed the PDF check.

Parts disappear when changing vendor on PO [119789]

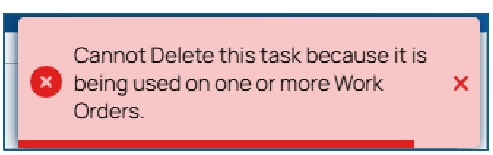
When editing a PO to change the vendor, the parts disappeared when selecting a new vendor, even when the parts were associated with the new vendor. We fixed this issue, so that when Vendor Part Linking is ON, the added parts remain under the Parts tab if they are also linked to another selected vendor. Otherwise, the parts are removed when changing the vendor on the purchase order.

When Vendor Part Linking is OFF, all parts remain under the Parts tab, and no parts are removed when changing the vendor on the purchase order.

Work order tasks don't delete from the list when you click "Delete" [122414]

The reason work order tasks were not being deleted is that they had been added to work orders.

It is intended functionality to prevent tasks from being deleted if they are being used on one or more work orders. To let users know why the tasks cannot be deleted, there is now an error message with the details:



Branch on PO disappears [122202]

We resolved an issue found when delivering a purchase order with items, parts, or part kits, the branch assigned to those items, parts, or part kits was being removed.

Can create a customer with an invalid phone number, but then when you make a proposal it won't save [123401]

We changed fields to prevent users from entering spaces in the phone fields. These changes apply to the following pages:

- Custom Fields
- Stages Phone
- Customer Bill To Edit
- Customer Detail Edit
- Customer Site Detail Edit
- Customer Wizard
- Customer Wizard Site
- Contact Add/Edit
- Lead Add/Edit
- Lead Contact Add/Edit
- New Customer Registration
- Company Info
- User Add/Edit
- Vendor Add/Edit
- Work Order Add/Edit
- Customer Portal Edit
- Account Details
- Authorities Add/Edit
- Proposal Add/Edit

Auto pay transactions still run even if invoice is deleted [123479]

Transactions were not previously voided when an invoice was deleted. This has been fixed. Also, navigation returns users to the customer details page once an invoice, which was navigated to from the customer details page, is deleted.

Open appointments count on work order is incorrect [123691]

To address this, the filter is now applied on the backend instead of the frontend, so that the data received from the query only contains open appointments.

History does not display the tax changes correctly [124019]

We resolved this so that the history of IDs (such as Item Id, Recurring Reason Id, Category Id, etc.) display more meaningful values to users.

When you delete an item/part type or sub-type, it doesn’t actually delete [124903]

We fixed this issue so users can delete an item/part type or sub-type.

Cannot change a work order type when creating a new work order [125681]

We resolved an issue users had with changing the work order type on a new work order.

Late fee invoice generated but late fee is not removed from account [125950]

We fixed this issue; when using batch payment to pay the full late fee, the late fee amount is now updated on the customer.

Setup > Customer Info tab is showing a different company’s information [126438]

We fixed an issue where the Company Info page (Setup > Company > Company Info) would show the incorrect information.

Cost on WO vs PO [127069]

We resolved an issue where the part costs on work order purchase orders were incorrect.