Managely Release Notes

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Enhancements

Accounts Receivable > Work Orders

Time on Work Order Confirmation Text [00138123]

When technicians were set to get appointment notifications when the customers confirmed, the confirmation to the technicians showed the wrong time.

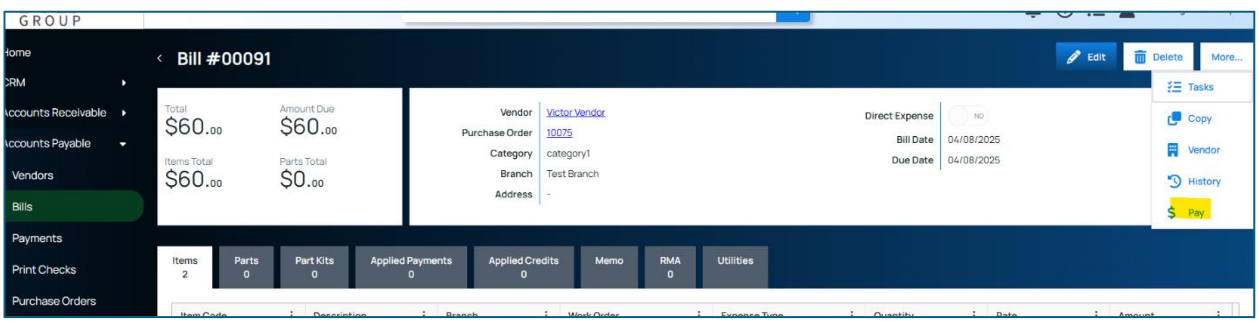
Technicians receive an SMS when an appointment is scheduled; when a client confirms an appointment, the appointment time is converted to the technician's system defined time zone.

In addition to this, we also fixed an issue regarding the time shown, which was off by one hour, in the message when a client confirmed or rejected an appointment. This was due to daylight savings time not being taken into account.

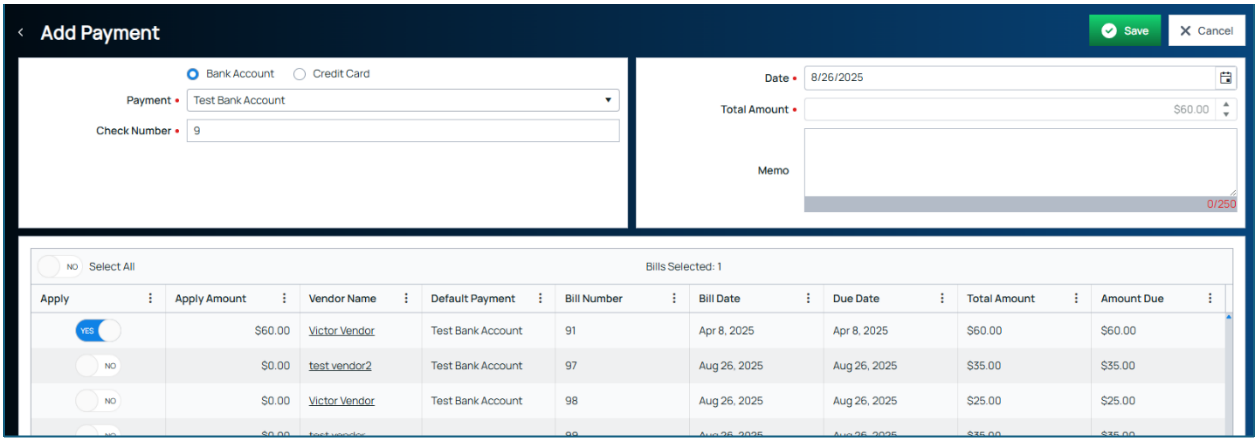
Accounts Payable

Account Payable Payment Different Screens [00140791]

When making a payment from a vendor bill, the page did not give users a way to select a credit card. We changed this so that when users pay a bill from the bill detail page, shown here-



-they are directed to the Add Payment page that is used under Accounts Payable > Payments > Pay Bills:



The Bill is automatically selected in the grid, and the total amount field in the top right is automatically populated with the bill's total amount. Users can choose Credit Card and select a credit card account (added under GL > Credit Cards).

By default, Bank Account is chosen, and the Payment field is also automatically populated with the default payment bank account (if any) from the vendor associated with the Bill. If there is no default payment account, then the user must select one as it is required.

Application Corrections

Error trying to inactivate system tied to voided work order [140103]

When a work order was voided, users could not make the system inactive or terminate the customer because the system considered the work order as open.

We changed the query for making systems inactive to account for voided work orders. This resolved this issue.

Customer batch uploader- missing fields

We added some fields that were missing from the customer batch uploader:

- Customer/Timezone (Required)
- Customer/Do Not Enter Collections (Not Required) - Pro
- Customer/Show Contacts on Sites (Not Required)
- Site/Timezone (Required)
- Site/Service Level (Required)

- RMR/Category (Required) – Pro

Receiving error when attempting to run the AR Aging Report [141276]

The error occurred due to a long processing time. We improved efficiency of the report to resolve the error.

Sales tax issue [142369]

On a proposal, when deleting items and saving the proposal, the sales tax was not recalculated. This issue was also happening when selecting parts and then deleting a part. We fixed this issue for both items and parts so that sales tax is recalculated.

Search filter on GL appears to be case sensitive [142338]

We changed the search filter to not be case sensitive. Users should get the same results when searching for information when typing capital letters or lowercase letters.

Address display issue for specific customer- PDF file invoices [00142701]

This issue happened specifically to invoices that had no associated bill-to. The system checked if the Address2 field was empty and automatically removed it from the form if it was, so there was not an empty line on the address. However, this check only happened if there was a Bill To.

To address this, we added another check that also removes the Address2 field if there no is Bill To associated with the invoice. Invoices like the one the customer was seeing will display correctly on the PDF file without the extra blank line.

Street Address is displaying character as lower case and it should be upper case [143262]

Users typed the address in one case/format, but it displayed in another (title case) format.

We corrected the issue that was transforming the address to lower case.

Invoice printing wrong amount [142485]

An invoice showed the wrong amount; it seemed to be missing tax on the labor.

We fixed the printing issue by updating the WorkOrderEFormMappingProfile mappings. We no longer depend on whether a Taxable Property item is recurring; instead, we use the RecurringItem property directly from items.

Closed work order tab not populating all columns [144016]

The work order grid custom field was missing three properties (closedDate, invoiceId, and invoiceNumber). We added these, and now all the data is appearing correctly in the closed work order grid. In addition, the links under the Invoice # column were not functioning; we fixed those as well.

Invoice to master toggle missing [144623]

When adding a new customer to a master customer, the Invoice to Master toggle was missing from the add customer wizard.

We added the Invoice to Master toggle in the Customer Wizard.

Vendor payment link not available on vendor [144740]

On the Vendor detail page on the Payments tab, there was no link on the Payment # allowing users to navigate to that vendor payment.

We fixed this so the Payment # is a hyperlink to the payment number.