



# Managely Release Notes

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**MANAGELY™**

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## Enhancements

### Creating a System from a Proposal

When users add a proposal, they can add a new system to the proposal. This uses the same process as adding a system to a customer site. Users can edit the system from the proposal. When users mark the proposal as sold and complete and generate a work order or an invoice from the proposal, Managely adds the system to the customer.

The screenshot shows the 'Create Proposal #0' interface. It features a sidebar with pricing information, a central form with various input fields, and a right-hand section for system and site details. A red box highlights the 'System' dropdown menu and its associated '+', and edit icons.

### Remove Email as Required Field for Site

There are changes to the Site page and the Customer Wizard Site page: these no longer require an email, and they load the system defaults.

The 'Add Site' form is shown with a red box around the 'Email' input field. An error message 'Error: Site name is required' is visible below the 'Site Name' field. The 'Use Customer Address' toggle is currently turned off.

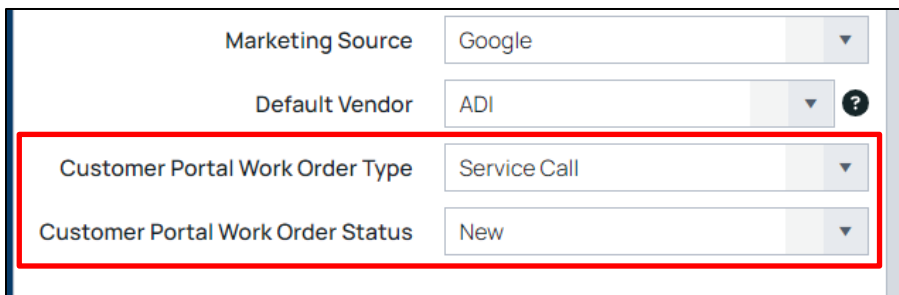
## Add License Type to Bottom Right of Managely

The License Level (Essentials, PRO, or Enterprise) is now shown in the bottom right of the screen.

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## Add Site Required Fields and Default Changes

On the System Defaults page, the fields that refer to the Customer Portal Work Order Type and Customer Portal Work Order Status are clearly labeled.



The screenshot shows a configuration interface with four dropdown menus. The first two are 'Marketing Source' (set to Google) and 'Default Vendor' (set to ADI). The last two, 'Customer Portal Work Order Type' (set to Service Call) and 'Customer Portal Work Order Status' (set to New), are enclosed in a red rectangular box to highlight the changes.

## Application Corrections

Resolved Issues
<p><b>TimeZone Error creating a user</b></p> <p>When creating a user, the <b>Timezone</b> field has a default so that it is not left blank.</p>
<p><b>Vendor Dropdown only showing first 100</b></p> <p>On Vendor Bill, Credits, and Receipts pages, users can type the vendor in the <b>Vendor</b> field. If a user drills into any of these pages from the vendor detail page, the vendor is selected by default.</p>
<p><b>Payment Batch drop down not showing master customers</b></p> <p>When choosing a customer in the Payment Batch, all customers are available for selection.</p>