Managely Release Notes

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Version 5.3.78

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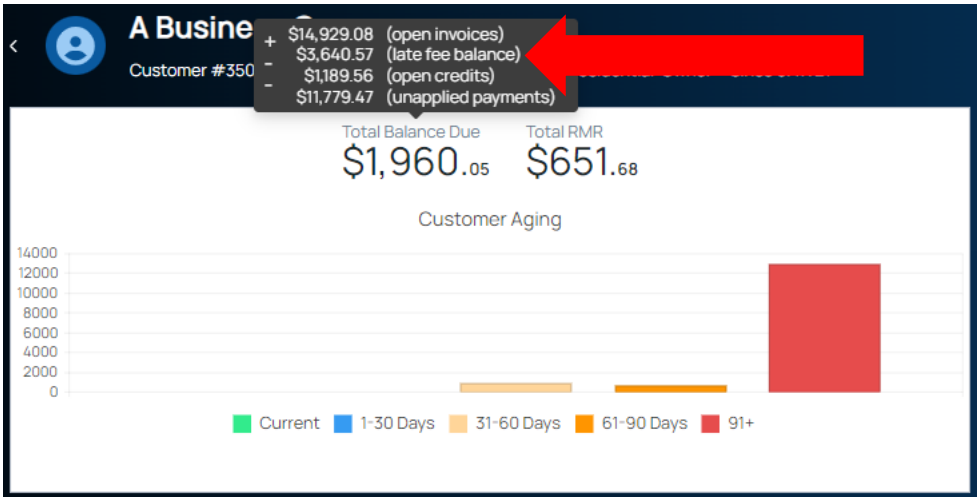
Enhancements

CRM > Customers

Late Fee Payment Changed to Late Fee Balance

On the Customer page, hovering over the Total Balance Due amount shows a breakdown of what makes up that total. One line in the breakdown was labeled “late fee payment.” That label was misleading, because it suggested the amount was a customer payment. The amount is the unpaid late fees. We changed the label to “late fee balance.” (This also matches the term the AlarmBiller product uses for this amount, “Late Fee Balance.”)

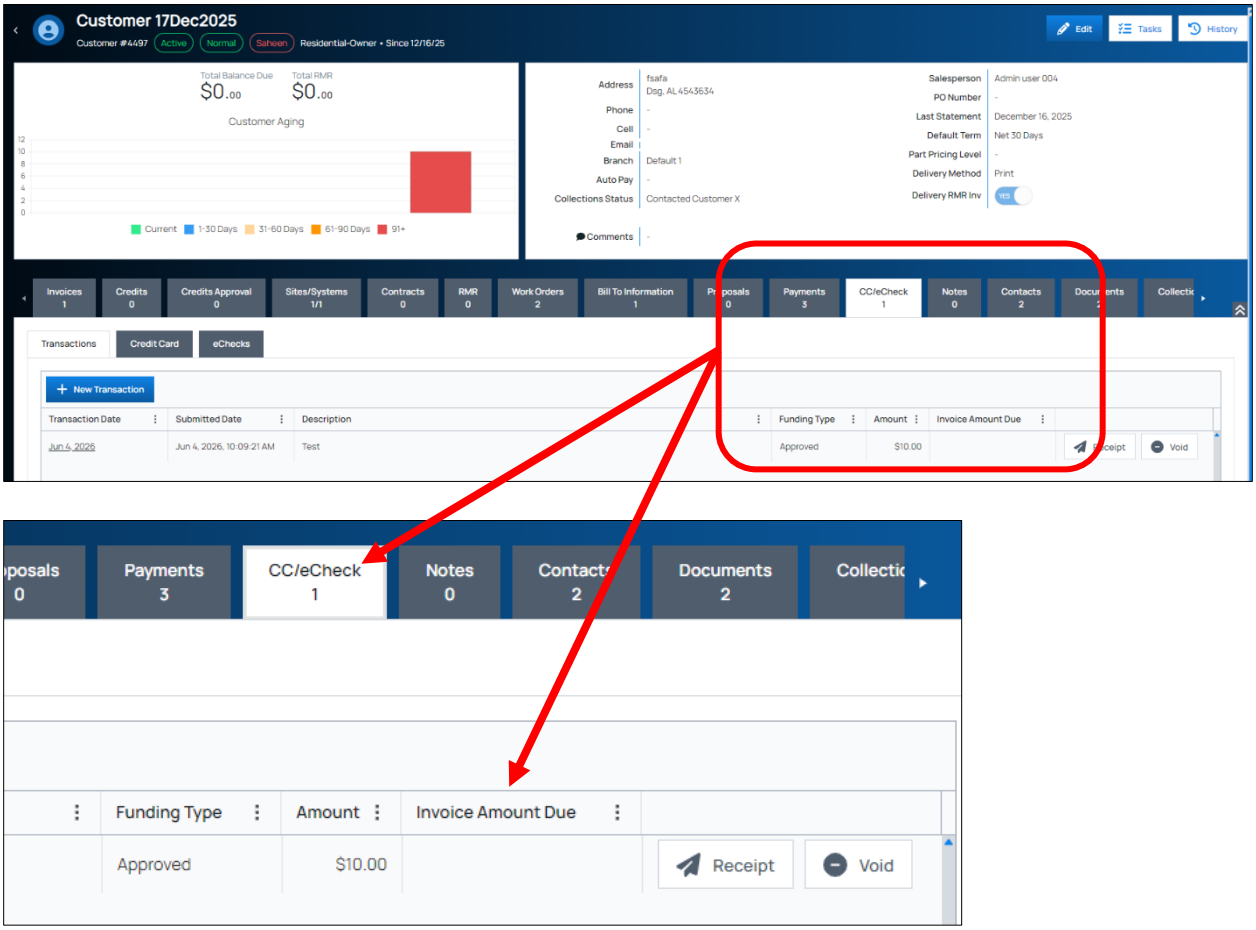
This change affects only the label. The amount shown and the way it is calculated have not changed.



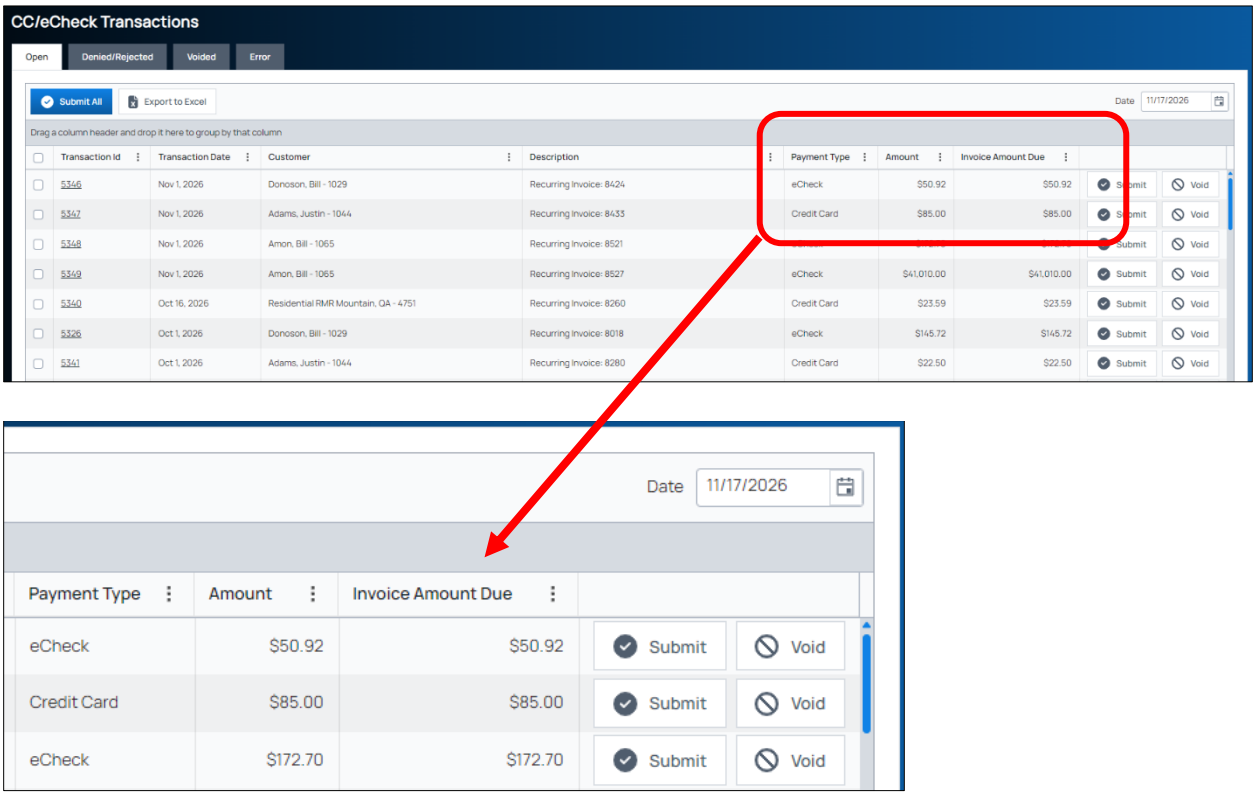
Invoice Amount Due Column added to Credit Card and eCheck Transaction Lists

A new Invoice Amount Due column now appears on two screens: the customer's CC/eCheck Transactions tab (CRM > Customers > Customer detail page > CC/eCheck tab), and the Open tab of the Payments CC/eCheck Transactions page (Accounts Receivable > Payments > CC/eCheck > Open tab). Users can now see how much is still owed on the invoice paid by a credit card or eCheck transaction without leaving the screen to open the invoice or the customer's accounts receivable.

CC/eCheck Transactions tab (CRM > Customers > Customer detail page > CC/eCheck tab)



CC/eCheck Transactions page (Accounts Receivable > Payments > CC/eCheck > Open tab)



The column appears by default, directly after the Amount column. Its values are shown as currency and aligned to the right, like the other amount columns. Users can sort the column and filter it with a numeric filter. On the CC/eCheck Transactions page Open tab, the column is also included when users export the list to an Excel spreadsheet.

The column shows the current amount due on the invoice or invoices that the transaction paid. When a transaction covers more than one invoice, the column shows the combined amount due. An invoice that is both applied to the transaction and set up as its recurring or auto-pay invoice is counted only once. If a transaction has no invoice, the column is blank. A fully paid invoice shows $0.00. Voided, rejected, and refund transactions follow the same rules.

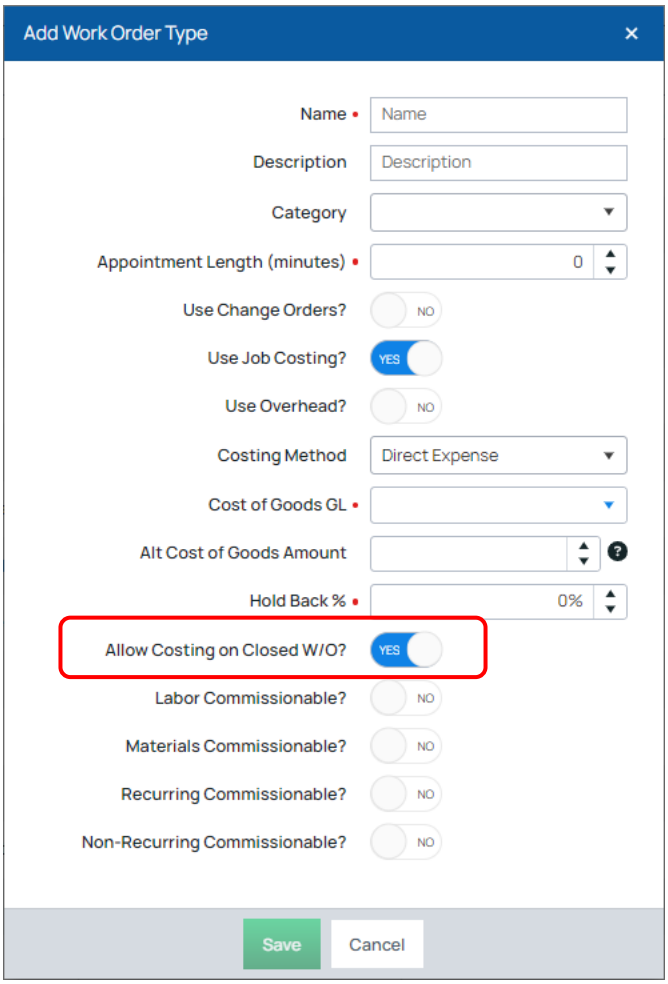
The column shows the invoice balance as it is now, not as it was when the transaction took place.

This change does not apply to the Denied/Rejected, Voided, and Error tabs of the Payments CC/eCheck Transactions screen or to other payment or transaction lists.

Setup > Operations > Work Order Types

Allow Costing on Closed Work Orders [00151627, 00172264]

The **Allow Costing on Closed W/O?** setting on a work order type now works. This setting appears on the Add Work Order Type setup screen when Use Job Costing is set to YES. Users could previously set **Allow Costing on Closed W/O?** to YES, but it had no effect.



When both **Use Job Costing** and **Allow Costing on Closed W/O** are turned on for a work order type, users can now link costs to a closed work order of that type. This applies to purchase orders (including the header, items, and parts), vendor bill and receipt line items, and vendor credit lines. Closed work orders from these work order types now appear in the work order lists on these screens and are labeled (Closed). Open work orders continue to work as they did before.

Users can also receive direct expense parts against a closed work order when its work order type allows costing on closed work orders.

Several rules apply:

- Closed work orders whose work order type does not allow costing on closed work orders cannot be selected. The system also rejects saving a cost against such a work order.
- Void work orders can never be selected.
- Recurring work orders are not included.
- Purchase orders that are linked to a project continue to show only open work orders.
- A purchase order or bill that is linked to a work order that was closed later still displays that work order. However, the work order lists in the receipt and vendor credit headers do not yet display such a work order.
- A purchase order cannot be received or billed if its work order closed after the purchase order was created, unless the work order type allows costing on closed work orders.

When a cost is added to a job-costed work order that is already closed, the cost is recorded to the item's expense account or to the cost of goods sold account, and it is never recorded to work in progress. This is because work in progress was already cleared when the work order closed.

Application Corrections

Late fee payments are generating late fee invoice but payment is not being applied and cannot be located [00170037]

We corrected a problem with how late fee payments are applied when they are entered on a deposit. When a customer paid a late fee together with a payment for an invoice, Managely created a late fee invoice, but the late fee payment was not applied to it. The Late Fee invoice stayed open with its full balance, and the payment did not appear where it was expected on the customer account.

Late fee payments are now applied to the late fee invoice. The late fee is paid first, and it is added on top of the amount entered for the selected invoice. For example, if a payment of $300 is entered with a $10 late fee, the selected invoice receives $300 and the late fee invoice receives $10. The invoice payment is no longer reduced to cover the late fee.

Title is absent from the Task Bar [00170913]

We fixed an issue where the Title column could disappear from the Tasks list. This happened when many columns were shown and the browser window was not wide enough to fit them. The Title column is now

always visible. When the window is narrower than the columns need, the list scrolls from side to side so that no column is squeezed out. On wider screens, the Title column uses any extra space.

This applies to the Tasks screen and to the Tasks window that opens from a customer's record.

Some RMRs didn't run again for second month [00171022]

We improved how Managely reports a problem when a recurring monthly revenue (RMR) item cannot be invoiced. Previously, if an RMR was linked to an inactive system, it failed validation during invoicing. That caused the entire invoice for that customer to be skipped, including the customer's other valid RMRs. The error message was raw validation text. It did not say which RMR, system, or site was involved, or how to correct the problem.

The error messages for RMRs on an inactive site or system now identify the RMR and the system or site. They also explain the fix. For example, the message says to reactivate the system or move the RMR to an active system. Other RMR validation messages now begin with the RMR number.

When a customer is not invoiced because of one of these errors, the message now says that the customer was not invoiced. It gives the reason and tells users to run RMR again for that customer after correcting the problem. Other customers are not affected.

The RMR summary email for the automatic monthly run now lists any errors that occurred. The email is also sent when no invoices were created, if there were errors. Before this change, an error during the automatic run was shown only as an on-screen notification that no one might see overnight.

eForms designer mode does not match what is sent to customer [00171252]

We corrected a problem with radio buttons on eForms. In the eForm designer, radio buttons appeared in the correct place. In the eForm preview and in the PDF sent to the customer, they did not match. They appeared as square boxes, and some overlapped the text of the form.

Radio buttons in the eForm preview and in the PDF sent to the customer are now round, and they stay in the position set in the designer. Each radio button is drawn at the left of its option. Its size follows the height of the option, up to a maximum size. A selected radio button shows a dot, and an unselected one is empty. The label appears next to the radio button, centered vertically on a single line. If Show Label is turned off, or if the option is too narrow to fit a label, only the radio button is shown. A background color or border set for a radio button option now fills the whole option, including the radio button, the space after it, and the label.

The page where customers sign an eForm was also updated to work with the new layout. The clickable radio button now sits exactly over the radio button in the form, without covering the label, and choosing

one option in a group updates all the options in that group. eForms that were sent before this change continue to display and work as they did before.

Managely and Forte are not matching because a late fee was not charged [00171580]

We corrected a problem where the amounts shown in Managely did not match the amounts charged in Forte. A customer's payment in Managely included a late fee, but the late fee was not included in the amount actually charged. For example, a payment recorded as $446.92 in Managely showed only $436.92 in Forte. In cases like this, the $10 late fee was recorded as paid and removed from the customer's balance, so the dealer could not try to collect it again. This was resolved by the same correction that we made for another issue (see Late Fee Payments are generating Late Fee Invoice but Payment is not being applied and cannot be located), where late fee payments were not being applied correctly. Late fee payments are now applied correctly.