Managely - 5.1.1 - 06/08/2022

01/05/2024 5:50 pm EST

Features

Managely SGS Integration

This integration provides the ability to create and link Customer, Site, and Systems between the Managely and Stages platform. This can be done from several places within Managely:

- New Customer wizard
- Existing Customer site
- Existing Customer System

With these accounts linked, users can manage Stages contacts and configurations (zones), view Stages account data and history, and put individual systems (devices) or the entire account on-test, all from within Managely

(PRO/Enterprise) **Branch Management**

Branching is a feature that will separate General Ledger activity and record the activity to the branch specified. This feature adds the ability to specify a branch for any entity in the application that would affect the General Ledger to ensure that that activity is separated into the respectively selected branch. Users can then report/filter reports based on the branch that was associated with the activity to get a better understanding of how their branch is functioning

(PRO/Enterprise) **Accounting Periods**

Accounting periods are utilizes to track General Ledger activity within a given time frame. These periods are divided up into years that have 12 periods (months) within them. Users have the ability to manage their accounting periods, meaning the start of their fiscal year and the current year they would like to manage, as well as managing the opening and closing of periods to be worked in. Having the ability to open and close these periods will ensure that all activity throughout the application is being done within the proper periods of business, as an accounting period with a status of anything other than open will prevent activity that posts to the general ledger from being posted to those periods

(PRO/Enterprise) **Categories**

This feature groups financial transactions into user-defined categories for reporting purposes. A Category may be a department within your company, a geographic location, a division of service, a profit center, or anything else that provides value in separation. A field for Category has been added to all entities that can produce a general ledger entry that posts either to an income or expense type account, as categories only affect these areas of the general ledger

Unapplied Cash/Credit GL Accounts/Flow

Added a default Unapplied Cash and Unapplied Credit account to the General Ledger. These accounts will function as a pass-through account for Accounts Receivable in that if a payment or credit is created that is not applied to an invoice or an existing payment or credit is unapplied from an invoice, those entities will post a credit to the unapplied cash or unapplied credit accounts respectively as opposed to accounts receivable. This more accurately represents accounts receivables within the database.

General Ledger Balance Column

Adding a balance column to the General Ledger Details Page that will show the balance of the GL account when that GL entry was created so that users can track how each entry has effected the balance of the GL account

Excel Import/Export Journal Entry Option

Allows users to be able to export/import journal entry details so that they do not have to manually enter journal entries for things that they will routinely need to enter

(PRO/Enterprise) **Multiple Customer Bill To**

Provide the ability to add different 'Bill To's to customers, which represent different billing entities (addresses, contact information, etc.) associated with the customer and can be utilized when billing or sending information to the customer. Users will have the ability to make a Bill To address primary (which will be the address displayed for that customer and the address defaulted for use with invoices/credits) or default a bill to address to be utilized for work orders or RMR.

Customer/Site Item Rate Defaults

Provides users the ability to apply different default rates to their items for specific customers/sites that differ from the default rate created when setting up the item

(PRO/Enterprise) **Contract Management**

Provides the ability to manage a customer's contracts at the customer level. Each contract will have an expiration date and, with this feature, the salesperson associated with the contract will be automatically be notified via email when this expiration date is 30 days out. This will provide users the ability to determine the warranty and recurring for a system based on the contract information, as well as connect a contract to an eForm for electronic signature/documentation of the contract

Generate Remaining Term Invoice

When terminating a customer, provide the option to automatically generate an invoice for the remainder of the customer's active contract associated with the RMR if the customer chooses before the cancellation process is complete

(PRO/Enterprise) **RMR Grouping**

Provides the ability to associated RMRs in the system to groups that can be created in the setup. This allows users to cycle or generate invoices only for RMRs that are associated with a specified group or groups

(PRO/Enterprise) **RMR Processing Day**

Provide the option for users to specify a specific date that RMR's will cycle through as opposed to always processing on the first of the month. This will allow for more flexibility in the processing of recurring, giving users the ability to only process recurring that occur at specific times of the month without processing all recurring that are set to cycle for that month

RMR Rate Increase Day Exclusion option

Add an option to the rate increase where, before submitting the rate increase, users can specify 'Do not rate increase customers who have had a rate increase within 'x' days'

RMR Rate Increase Custom fields

Adds custom fields in the RMR rate change grid. This will allow the user to sort/filter based on those fields and only include the RMR's they wish to the rate increase in question.

(PRO/Enterprise) **User Note/Document Access Level**

Added access levels that can be assigned to users so that we can determine what notes and documents users can view or post. The levels available range from 1-3 where level 1 is general access, level 2 is internal access, and level 3 is management level access. Level 1 notes and documents can be viewed by all users in the database, including customer users with notes and documents that can be viewed from the customer portal. Level 2 notes and documents can be viewed by those users who actually have access to Managely, excluding any customer users. Level 3 documents can only be viewed by users that have a level 3 access level selected for their user