

Managely Defect Work Around - Ungrouped Displays on Proposal

07/29/2024 6:07 pm EDT

In Managely version 5.3.39.11 if a Dealer prints out the default proposal PDF it will display the parts as ungrouped. Below is a work around for this issue until the defect is corrected.

1. Create a proposal like you normally would and add your parts. In this example we created proposal 11183 that has five parts.

MANAGELY™ **Proposal**

547 E. Washington Street
Apt. 2111
Chagrin Falls, OH 44023
(440) 551-4464 x123

Proposal #	Customer #	System Type	PO Number	Term	Proposal Date
11183	3704	Burglar Alarm		Due on Receipt	July 10, 2024

Customer:
Chewy Steckel
1940 Vancouver St.
Cuyahoga Falls, OH 44221 -

Site Location:
Chewy Steckel
1940 Vancouver St.
Cuyahoga Falls, TX 44221 -

Contact Information:	Brief Description:
Customer Contact Chewy Steckel Phone: (330) 208-3568 Email: essteckel@gmail.com	
Salesperson Name: Justin DeBaggis Phone: Email: justin.debaggis@boldgroup.com	

Charges

Description	QTY	Rate	Amount
Ungrouped			
12345	1.00	100.00	100.00
123-6815	1.00	10.00	10.00
Test Part #2	1.00	10.00	10.00
Supervised Fire module 12v	1.00	1,325.02	1,325.02
Ademco Money Clip Hold-up Sw	1.00	677.04	677.04
Total Charges:			2,122.06
Sales Tax:			193.21
Grand Total:			\$2,315.27

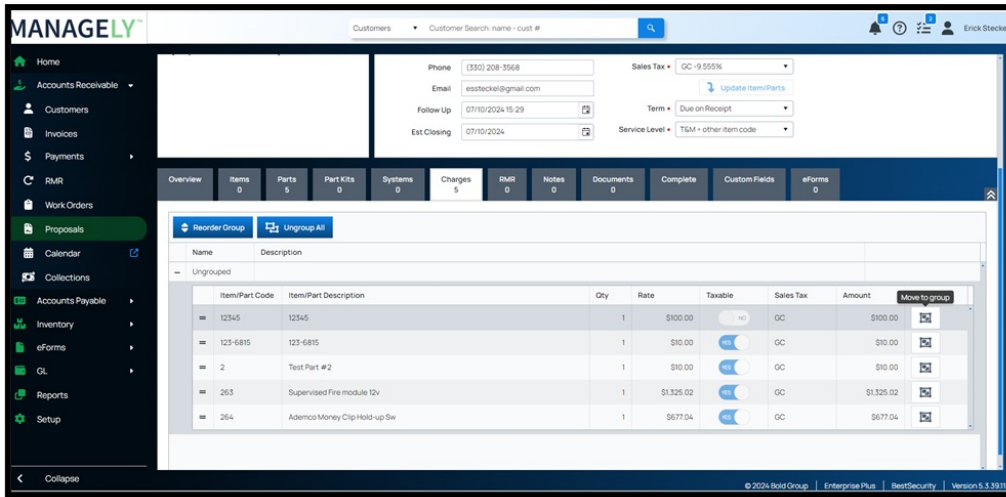
Notes

Note	Modified Date	User
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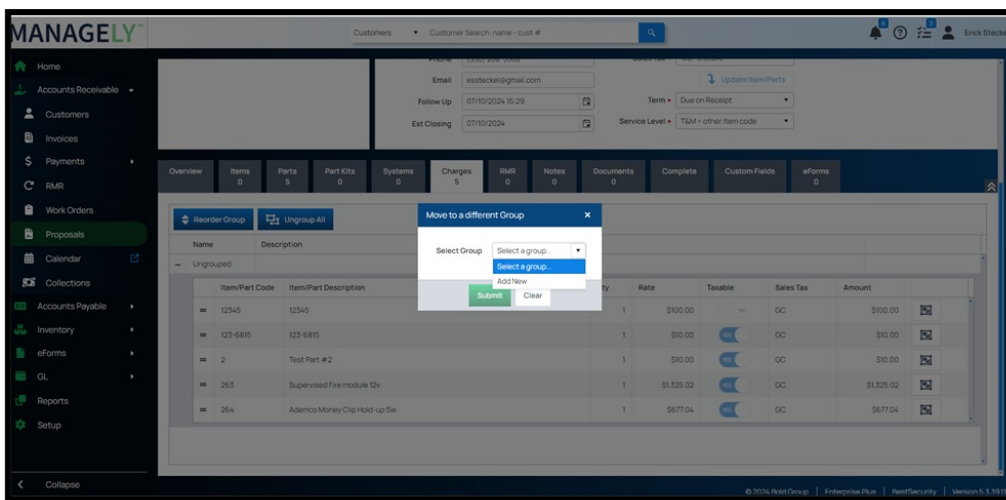
x _____
Agreed To By Name Date

2. Go into edit mode and click on the Charges tab

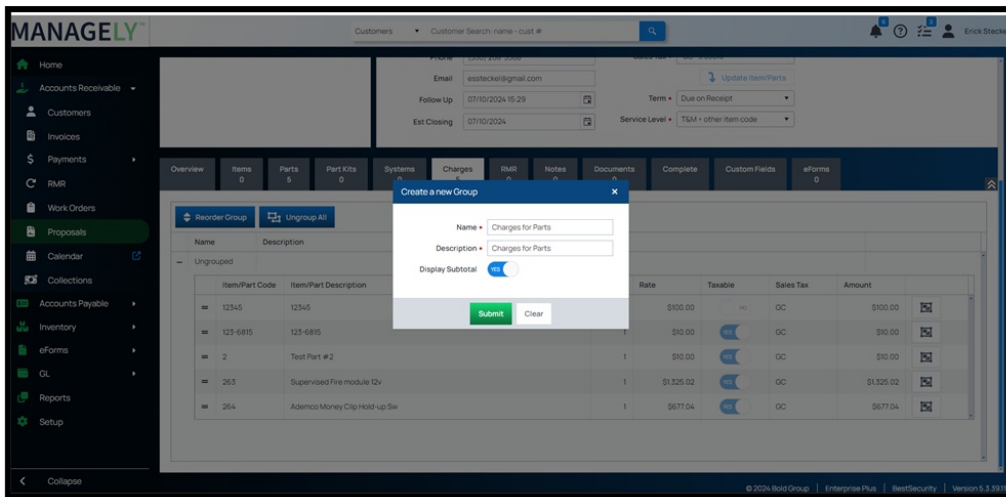
3. Click on the Move to Group icon



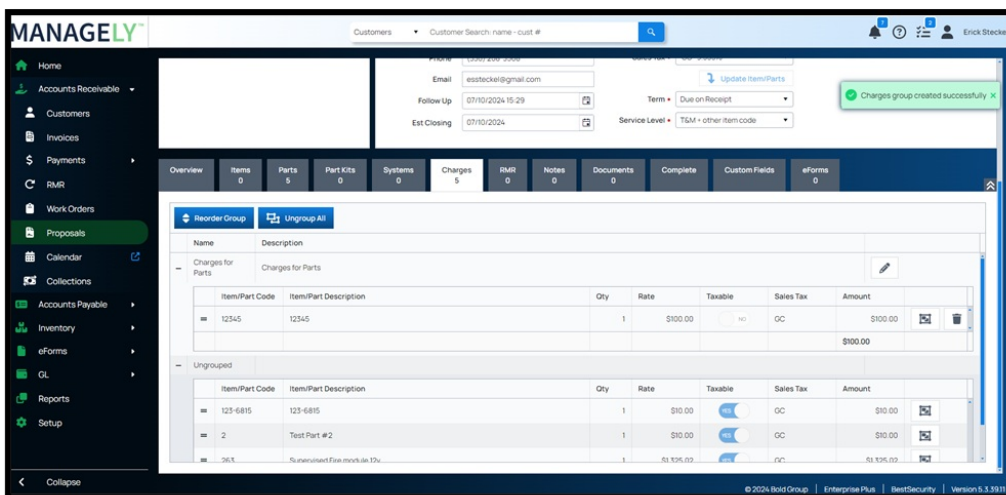
4. Click the triangle pointing down to the right of "Select a group" and then select "Add New" and then push submit



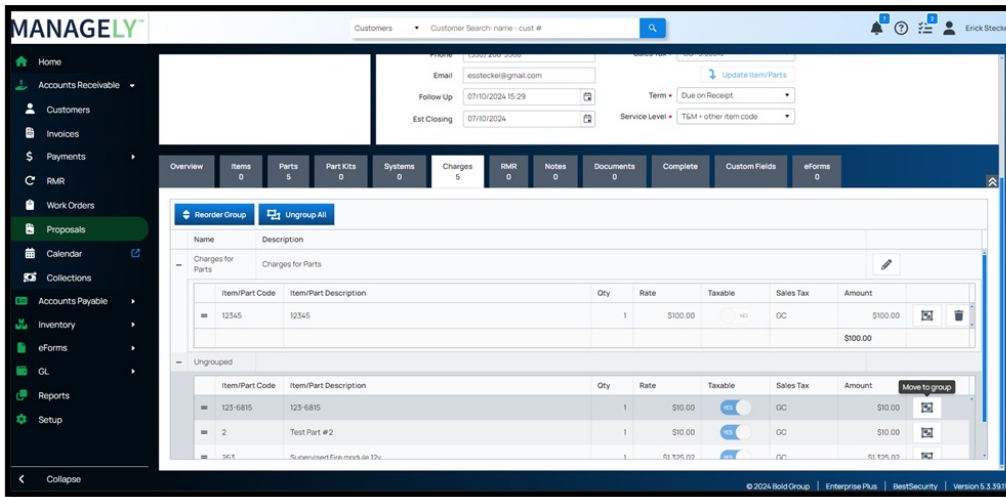
5. Fill out the fields in the "Create a new Group" box and then push submit (in our example we named the group "Charges for Parts")



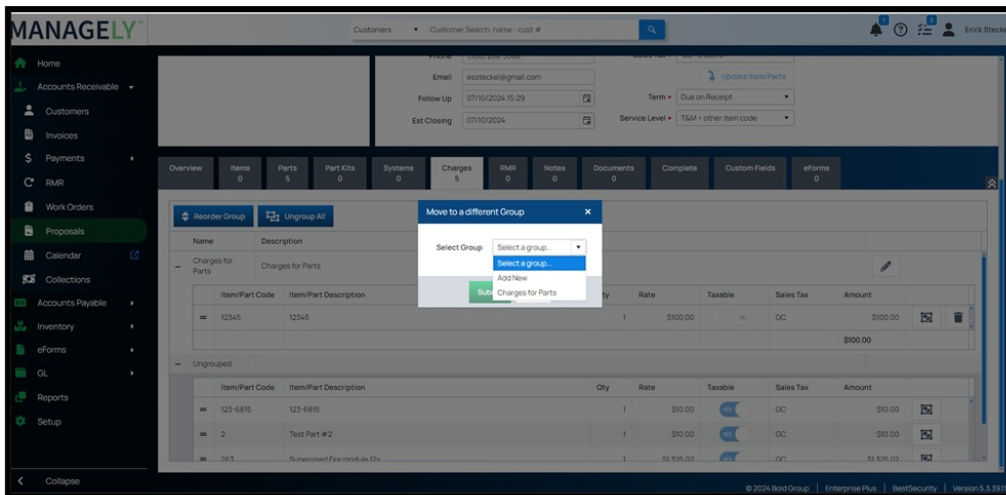
6. You will receive a message alerting you that your Charges group updated successfully



7. Click on the Move to Group icon to the right of your next part



8. Select “Charge for Parts” from the drop down and then push the submit button



9. Repeat these steps for all your parts and instead of displaying as “Ungrouped” your parts will display as the group you created “Charged for Parts”

