



## RELEASE NOTES

**Note: Manager is a web based product, therefore all upgrades are applied to our Manager client sites automatically.**

### Manager

#### Enhancement

**July 6, 2017**

- **New Accounts Receivable Aging Reports** – These reports are only available to those clients who have the optional Invoices, Payments & Statements and Reports modules in their Manager installation. (For more information regarding these optional modules, please contact [Amanda@realwired.com](mailto:Amanda@realwired.com))

**Note: The Report results are based on the date entered into the “Invoice Due Date” field in the Invoice record. If you require a retainer, you may want to update your Invoice Due Date field to the date the balance is due once the retainer amount has been paid.**

- A/R Aging Report Days – Displays all outstanding invoices grouped by aging (0-30 days, 31-60 days, 61-90 days, 91-120 days) and displays totals of invoice amounts, payments received and balances due.

Welcome to RealWiredManager Demo. Administrator | Log Out | Employees | Admin

Home | Appraisals | Clients | Contacts | Calendar | Invoices | Payments | Statements | Tasks | Reports

Last Viewed: A/R Aging Re... | 15-88484 | 1238 | 1242 | 1240 | 1241 | 1239 | 5035 Pine St... | Aaron Gellman | Call Client

Actions: Create new Report | List Reports

Reports > A/R Aging Report Days

Edit | Duplicate | Delete | Export | Snapshots | Tools | Run Report

Search/Filter Criteria

Name	Search Criteria	Equals/From	To
Assigned Appraiser	ignore		
Status	ignore		
Report Period/Aging	ignore		

Report Result

Report No.	Assigned Appraiser	Client	Subject Address	Subject City	Invoice Number	Invoice Date	Date Due	Invoice Amount	Payment(s) Received	Payment Date	Balance Due	Days Past Due
Aging: (1) 0-30												
16-120.DGA	Greg Lindsay	Center Bank	5035 Pine Street	Seffner	1238	06/01/2017	07/01/2017	\$1,800.00	\$900.00	06/15/2017	\$900.00	4
16-124.DGA	Greg Lindsay	Bank of New Tampa	131 Main St		1239	06/01/2017	07/03/2017	\$3,500.00	\$0.00		\$3,500.00	2
								\$5,300.00	\$900.00		\$4,400.00	
Aging: (2) 31-60												
16-118.DGA.2	John Hill	Live Oak Bank	424 Douglas Ave	Dunedin	1240	05/03/2017	06/03/2017	\$400.00	\$0.00		\$400.00	32
								\$400.00	0		\$400.00	
Aging: (3) 61-90												
042015-71		Bank of Tampa	1809 Tampa Street		15-88464	04/03/2017	05/03/2017	\$1,590.00	\$0.00		\$1,590.00	63
								\$1,590.00	0		\$1,590.00	
Aging: (4) 91-120												
042015-69	Amanda Wolff	Bank of New Tampa	3710 Coopers Pond ...		1241	03/08/2017	04/03/2017	\$1,500.00	\$10.00	10/10/2016	\$1,490.00	93
								\$1,500.00	\$10.00		\$1,490.00	
Aging:												
13-0394.DGA.2	Jeff Bennett	1st National	6909 Indian River Dr...	Tampa	1242	06/30/2017	07/30/2017	\$3,500.00	\$0.00		\$3,500.00	-25
								\$3,500.00	0		\$3,500.00	

- A/R Aging Report – Displays all outstanding invoices. Information available includes report number, assigned appraiser, invoice and due dates, invoice information and days past due.

Home | Appraisals | Clients | Contacts | Calendar | Invoices | Payments | Statements | Tasks | Reports

Last Viewed: AIR Aging Re... AIR Aging Re... 15-88484 1238 1242 1240 1241 1239 5035 Pine St... Aaron Cellman

Actions: Create new Report List Reports

Reports » AIR Aging Report

Edit Duplicate Delete Export Snapshots Tools Run Report

Search/Filter Criteria

Name	Search Criteria	Equals/From	To
Assigned Appraiser	ignore		
Status	ignore		
Report Period/Aging	ignore		

Report Result

Report No.	Assigned Appraiser	Client	Subject Address	Subject City	Invoice Number	Invoice Date	Date Due	Invoice Amount	Payment(s) Received	Payment Date	Balance Due	Days Past Due
042015-69	Amanda Wolff	Bank of New T...	3719 Coopers ...		1241	03/08/2017	04/03/2017	\$1,500.00	\$10.00	10/10/2016	\$1,490.00	93
042015-71		Bank of Tampa	1809 Tampa S...		15-88484	04/03/2017	05/03/2017	\$1,590.00	\$0.00		\$1,590.00	63
16-118.DGA.2	John Hill	Live Oak Bank	424 Douglas Ave	Dunedin	1240	05/03/2017	06/03/2017	\$400.00	\$0.00		\$400.00	32
16-120.DGA	Greg Lindsay	Center Bank	5035 Pine Street	Seffner	1238	06/01/2017	07/01/2017	\$1,800.00	\$900.00	06/15/2017	\$900.00	4
16-124.DGA	Greg Lindsay	Bank of New T...	131 Main St		1239	06/01/2017	07/03/2017	\$3,500.00	\$0.00		\$3,500.00	2
13-0394.DGA.2	Jeff Bennett	1st National	6909 Indian Rv...	Tampa	1242	06/30/2017	07/30/2017	\$3,500.00	\$0.00		\$3,500.00	-25
								<b>\$12,290.00</b>	<b>\$910.00</b>		<b>\$11,380.00</b>	

## Enhancements April 3, 2017

Issue: "Create Statement" action option in Invoices module not working properly.  
Fix: "Create Statement" action option in Invoices module now working properly.

## Enhancements February 9, 2017

Configurable Option - Add, remove or change all values in the "Status" field dropdown (except Engaged & Assignment Complete).

Currently, the "Status" field drop down values in an appraisal record cannot be edited or added to and based on the value selected each status moves the appraisal record through a preset appraisal workflow process.

Appraisals » 1901 N 15th Street » Edit

Save Cancel View Change Log

Assignment	Engagement	Billing	Commission	Valuation	Delivery
Status: *	Bid				
Client Name: *	Bid				
Subject Avenue Address/Location: *	Engaged				
Subject Municipality:	Cancelled				
Subject State:	Hold For Payment				
	Florida				

Engaged dropdown options: Engaged, Request Invoice, Cancelled, On Hold

Invoice Complete dropdown options: Invoice Complete, Internal Review, External Review, Assignment Complete, Cancelled

However, some of our Manager users have requested the ability to customize the values in the Status drop down list so they more accurately reflect their own workflow process.

Therefore, we are pleased to announce a new feature available in Manager that will allow you to customize your Status field drop down values. **However, this will alter your current Manager email notification processes.**

Commission	Valuation	Delivery
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Status: \* Engaged

- Bid
- Bid Not Active
- Cancelled
- Engaged
- Research Requested**
- Research Completed
- Internal Review
- Invoice Requested
- Invoice Complete
- External Review
- Hold for Payment
- Re-engaged
- On Hold
- Reactivated
- Assignment Complete

***NOTE: THIS ENHANCEMENT WILL NOT AFFECT CURRENT INSTALLATIONS***

- “Final Value” field located on the Advanced Search Options of Appraisal List View has been removed.

Job Name	<input type="text"/>	Bid By	<input type="text"/> <input type="button" value="↶"/> <input type="button" value="✕"/>
Final Value	Equals <input type="button" value="v"/>	Parcel ID	<input type="text"/>
Inspection Date	Equals <input type="button" value="v"/> <input type="text"/> <input type="button" value="📅"/>	Internal Reviewer	<input type="text"/> <input type="button" value="↶"/> <input type="button" value="✕"/>

- Ability of Client Admin user to see “Set Labels” subpanel in Admin removed

**Enhancements**  
**December 14, 2016**

- Field name labels in Manager can now be customized. The customization must be completed by RealWired technical support.
- Various optional Reports have been added to the software.