Managely Release Notes

December 2024

Version 5.3.43 INTERNAL COPY

MANAGELY®

Contents

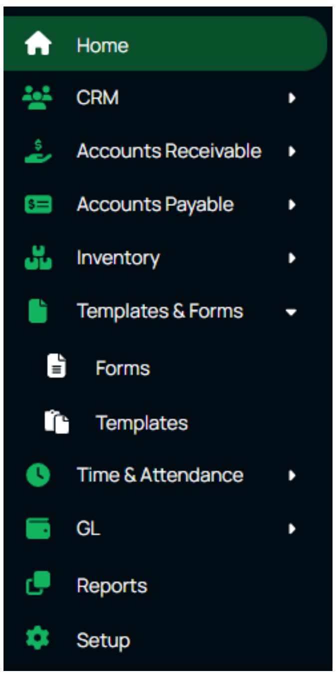
Enhancements

For additional information about the enhancements in the Managely v5.3.43 release and other releases, refer to the [Managely Knowledgebase](#).

33035 Streamlined the Template Navigation

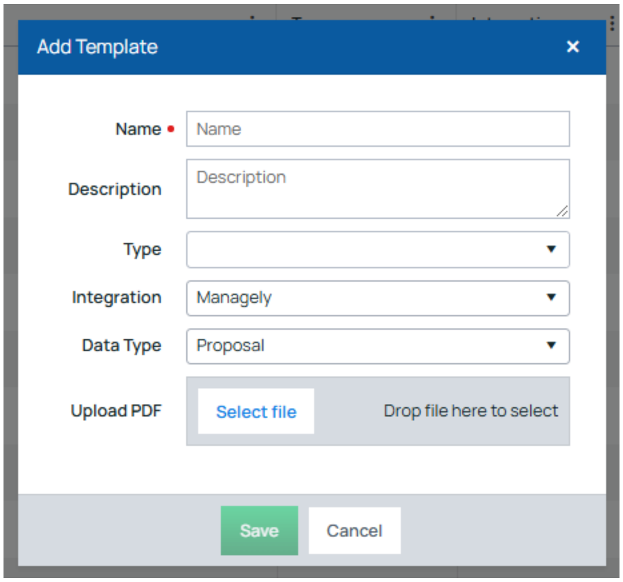
We made several changes to eForm Templates to make it easier to use these features.

1. Renamed the “eForms” top-level menu item to “Templates & Forms”:



2. Removed the redundant Templates menu item that was under Setup > Other.
3. Removed the existing Template Engine under Setup > Utilities and moved the functionality under the main menu item Templates & Forms.
   - Included the Default Templates (those that are locked with the only available action being Copy).
   - Added the Sync Default Templates action next to the existing Send Template action.

- On the existing Add Template, added the **Data Type** field:



4. Added Proposal, Contract, and Customer to the list of values available in the **Data Type** field.

49904 Combined Work Order Items and Parts with Change Order Items and Parts on Single Grids

We combined work order items/parts grid records with change orders.

52793 Work Order Total Amounts now include Change Orders

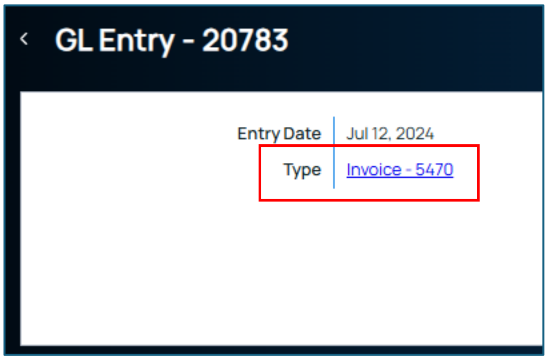
Work order total amounts now include change orders.

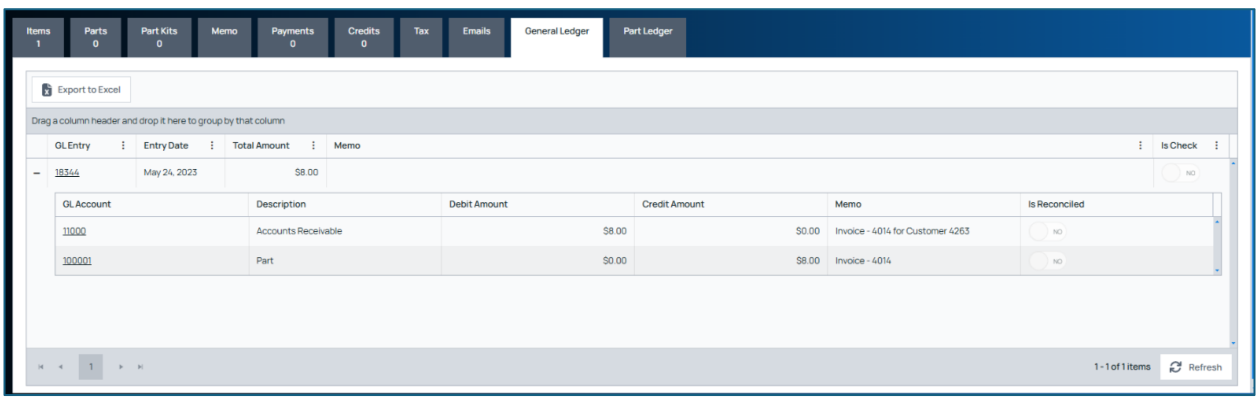
51010 Now Calculating Taxes on Proposals Via Avalara Integration

Managely now calculates taxes on proposals using the Avalara integration as it does for invoices. The default Proposal template includes the tax value(s) as a separate subtotal. These fields are also available in the eForms Template module for custom Proposal document templates.

49289 Improved GL Entry and Invoice Investigations

To help with researching GL issues, we changed the link for invoices so that it opens the invoice in a new browser tab or window (based on browser settings) and focuses on the invoice General Ledger tab:





51346 Improved Mobile Responsive eForms Interface [113728]

We changed the design for eForms, so they are easier to use and more responsive on mobile devices. This improves the formatting so that users can read and edit them more easily.

51564 Added Branch Selection to Standard Reports (Sales)

We changed the following standard reports to have an option of showing transactions or grouping transactions by branch:

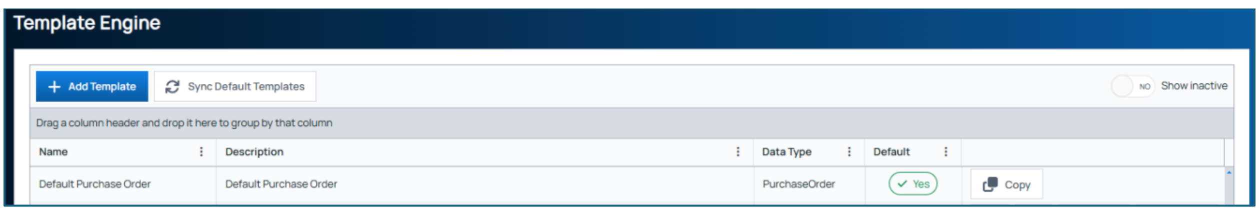
- Customer Sales Report (Reports > Sales)
- Detailed Sales Report (Reports > Sales)
- Current RMR Listing (Reports > Customer)
- Customer Auto Pay (Reports > Customer)

- Customer Listing Report (Reports > Customer)
- Expired Credit Card Report (Reports > Customer)
- Mail/Email Summary (added the Branch as a column in the grids for Outgoing Emails and Outgoing Mails) (Reports > Customer)
- Tech Time Report (Reports > Customer)
- RMR Audit Tracking (Reports > Customer)
- RMR In Force Report (Reports > Customer)
- RMR 12 Month Forward Report (Reports > Customer)
- RMR Increase Trend (Reports > Customer)

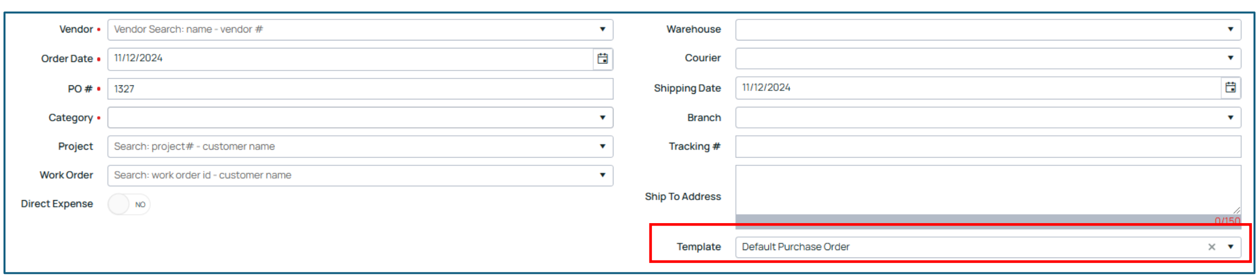
51585 Added Customizable PO eForm Template [116037]

We added a new default template for purchase orders and added a field for choosing the template on the purchase order add/edit page so users can print to a customizable PO template.

On the Templates page (Templates & Forms > Templates), there is a new Default Purchase Order. Users can copy this to create a customized purchase order template.



When adding or editing a purchase order, users will see a new field called Template. This field shows the templates from the Template Engine page.



Delivering a purchase order uses this template to format the purchase order.

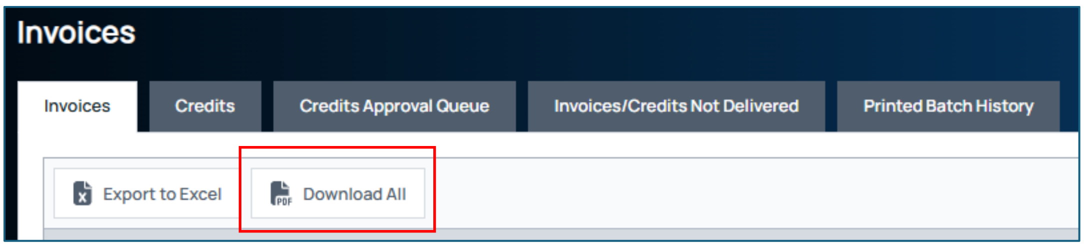
51846 Non-Deferred RMR

Users needed a way to generate non-deferred GL entries for non-deferred RMR items in recurring invoices.

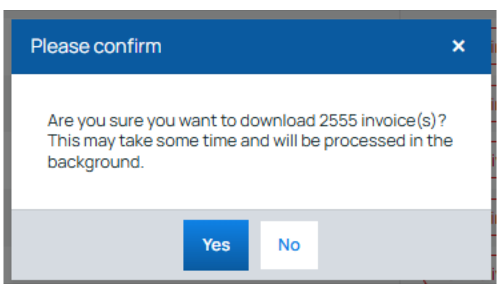
We made a change to allow the immediate realization of revenue in the GL entry for RMR invoices if an RMR item has its Deferred flag set to NO as opposed to how it currently works of realizing the revenue in future deferred GL entries.

52291 Added PDF Export that Combines Invoices on Invoices Grid [119787]

We added a button on the Invoices page (Accounts Receivable > Invoices) for users to download all invoices shown on the grid pages as a PDF file.



When users click the **Download All** button, there is a confirmation message indicating how many invoices will be downloaded. The download runs as a background job; the time it takes to download the invoices depends on the number of invoices. Click **Yes** to continue.



The download includes all invoices on all the grid pages. Filtering the grid by date range or customer can limit the number of invoices shown in the grid, reducing the number of invoices downloaded.

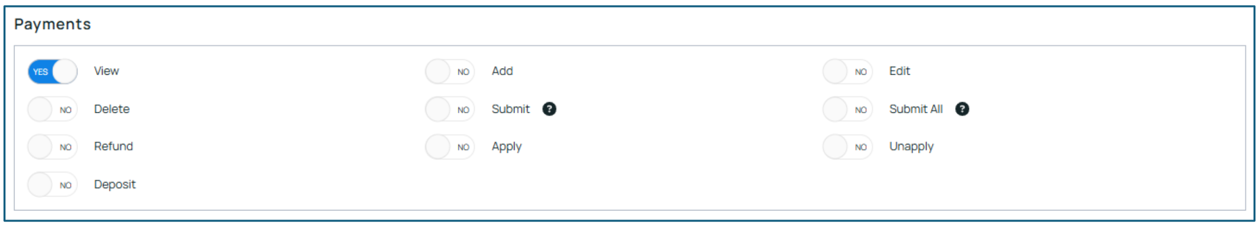
The PDF filename is "Invoices_" followed by the number of invoices downloaded and the date. For example, Invoices_831_2024-12-10 means there are 831 invoices in the file downloaded in 2024 on December 10.

52975 Added Branch to GL Posting Report

We added an option to sort data on the GL Posting Report (Reports > Accounting > GL Posting Report) by branch name. This is an option in the **Order By** field.

52992 Added Permission for Hiding Payment Information on Customer [120675]

On user management permissions (Setup > Company > User Manager), the Payments > View permission now shows or hides the Payments tab on the customer detail page in addition to showing or hiding the Accounts Receivable > Payments menu.



If this is set to YES, users can see the Payments tab on the customer detail page:

If this is set to NO, the Payments tab on the customer detail page is hidden:

53431 Restricting Changes To RMR Generated Invoices

There were issues with adding items to recurring invoices that were not originally part of the RMR generation. The issues were related to GL transactions; editing recurring invoices and adding items ultimately created incorrect GL entries. To avoid this situation, users can no longer edit recurring invoices generated from RMR.

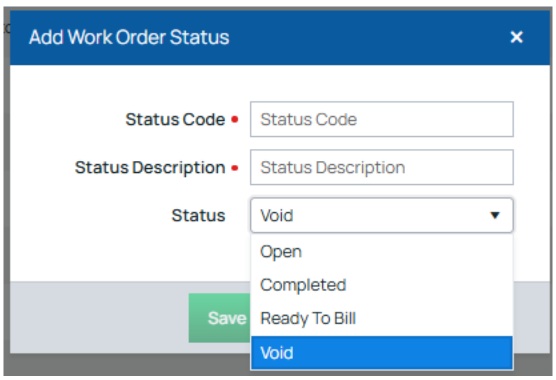
53706 Prevent Editing Delivered Invoices

Managely now prevents users from editing invoices that have been delivered to a customer. If an invoice is changed after delivering it, discrepancies occur between the amounts on the invoice delivered to the customer and what is recorded on the invoice within Managely. Now, when an invoice is delivered, the edit button on the invoice is disabled.

53340 Added Void Status to Work Orders

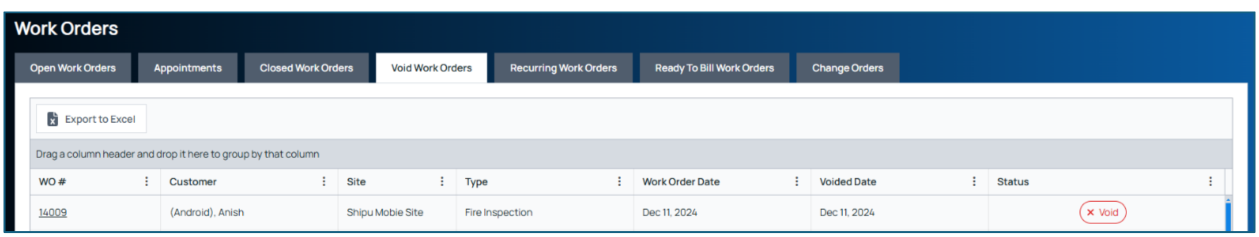
Important: This feature is currently not supported in the mobile app. Using the void status for work orders will cause instability in the mobile app. This mobile app instability will be addressed in a future release.

We added a work order status of void. Users can create a work order status and select the status of void. Open the Work Order page: Setup > Operations > Work Order Status. Click the Add Work Order Status button.

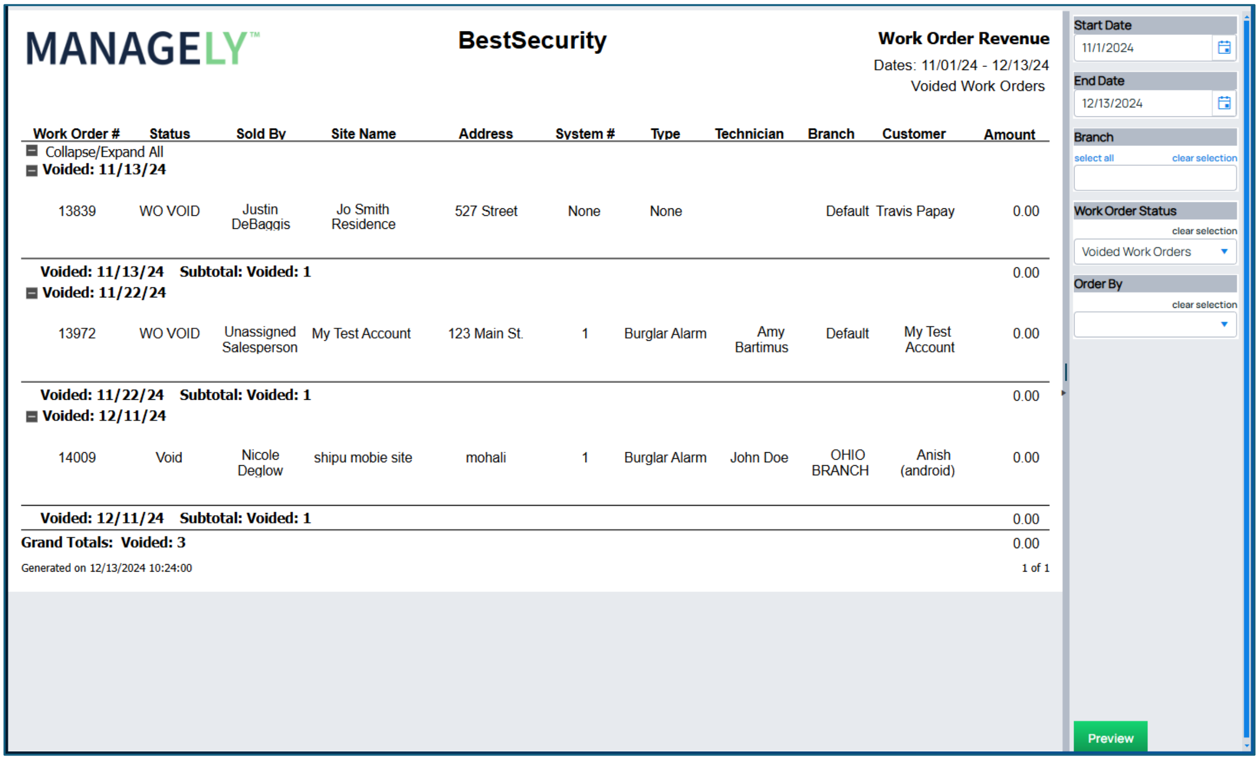


Type a **Status Code**, **Status Description**, and choose Void as the **Status**.

There is a new Void tab on the Work Order page (Accounts Receivable > Work Orders). This shows all work orders that have the void status:



The Work Order Revenue report (Reports > Accounting > Work Order Revenue) has a new option to show voided work orders:



MANAGELY™ BestSecurity

Work Order Revenue
Dates: 11/01/24 - 12/13/24
Voided Work Orders

Work Order #	Status	Sold By	Site Name	Address	System #	Type	Technician	Branch	Customer	Amount
Collapse/Expand All										
Voided: 11/13/24										
13839	WO VOID	Justin DeBaggis	Jo Smith Residence	527 Street	None	None		Default	Travis Papay	0.00
Voided: 11/13/24	**Subtotal: Voided: 1**									0.00
Voided: 11/22/24										
13972	WO VOID	Unassigned Salesperson	My Test Account	123 Main St.	1	Burglar Alarm	Amy Bartimus	Default	My Test Account	0.00
Voided: 11/22/24	**Subtotal: Voided: 1**									0.00
Voided: 12/11/24										
14009	Void	Nicole Deglow	shipu mobie site	mohali	1	Burglar Alarm	John Doe	OHIO BRANCH	Anish (android)	0.00
Voided: 12/11/24	**Subtotal: Voided: 1**									0.00
Grand Totals: Voided: 3										0.00

Generated on 12/13/2024 10:24:00 — 1 of 1

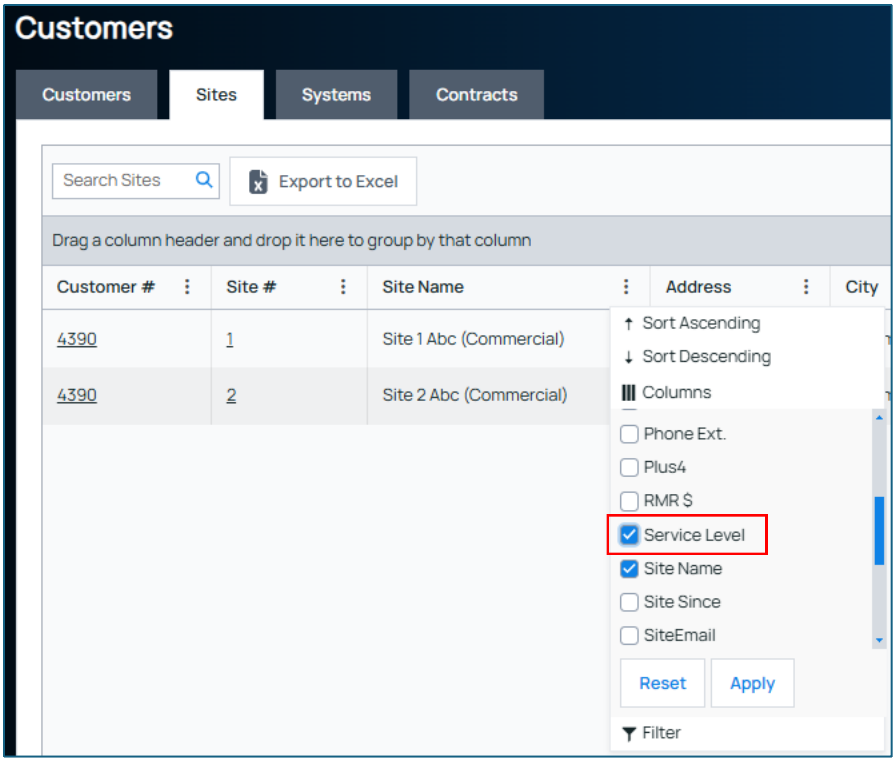
53600 Added Service Level Column on the Sites Grid (Customers > Sites) [124058]

On the Customers page, Sites tab, we added a column called Service Level. Users can add this column to the grid to see the service level for each site and export it to Excel if needed.

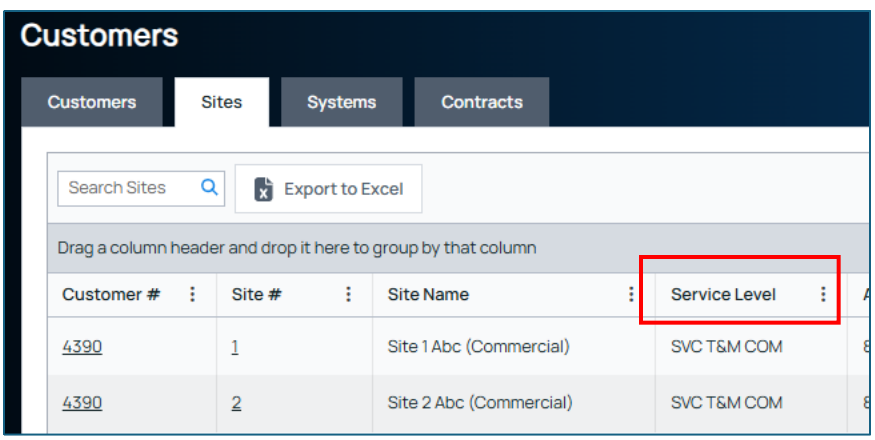
By default, this column is hidden. This is how to add the column to the grid:

1. Click the three dots beside a column name.
2. Click **Columns**. This shows a list of available columns.
3. Scroll down to **Service Level**. Select the checkbox.

4. Click **Apply**.



The option for columns closes. The column is shown in the grid.



Users can sort and group this column like other columns.

Application Corrections

49371 Delivering Bill To [111195]

When the Bill To email address had been changed on an account that was set up with email delivery, the Deliver button on an invoice was not populating the Bill To email address. It was populating the customer email address. Also, statements were not going to the Bill To email address, they were going to the customer email address.

We resolved this issue. On the customer detail page, on the Invoice tab, clicking the Generate Statement button, the default email address is the Bill To address that has the Primary Statement turned on; this is shown on the Edit Billing Information form. If there is no bill to information with the Primary Statement turned on, the customer's email address is the default. If there is no customer email address, the Email field on the Deliver Notification popup is empty.

52149 Opening new tab causes Managely to lose dark theme [119371]

Opening a new tab caused Managely to lose dark theme. Also, on the dark theme the upper right text with the username and sign out was illegible due to its colors. We fixed this so that opening a new tab does not cause the dark theme to be lost and that the upper right text with the username and sign-out options remains legible due to its color contrast.

52150 Username illegible in the upper right corner when using Managely dark theme [119405]

Using the dark theme, the upper right text with the username and sign out were illegible due to its colors. We fixed this so the upper right text with the username and sign-out options remains legible due to its color contrast.

52203 Average & standard cost erroneously combined [117442]

To resolve this, the average costing parts will now match the GL amounts. Previously, the part amounts on a warehouse were calculated by taking cost * qty, but for average cost parts, the cost may not perfectly line up with the Amounts recorded in the ledger. To address this discrepancy, average cost parts will now use the ledger entries to compute their total amount. Note: Any part issues will continue to use average cost * qty to calculate the amount; and any part cost adjustments will continue to make a corresponding GL entry to account for it.

52207 Credit Approval link doesn't take you to the credit that needs approved [119579]

When credit approvers would receive an email to approve a credit, the link in the email would not take users to the credit that required approval. We fixed this issue so that the link directs credit approvers to the credit to approve. We also fixed another issue when users were logged in, they were redirected to login page; after login, the URL to the credit approval page was not working and taking them to Home page.

52699 Customer contacts set for email invoice delivery are not receiving invoices [120621]

Previously, customer contacts would only get the email when the options were checked (toggles set on the contact with a valid email address) AND that the invoice was delivered via email (contacts would be included in the email CC field). With this change, customer contacts will also get an email when the invoice is mailed. Contacts will be listed as recipients on the email.

52962 Print check on check GL detail amount total is double [121276]

We resolved an issue that would double refunds when users printed the PDF check.

53316 Parts disappear when changing vendor on PO [119789]

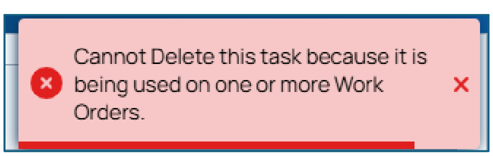
When editing a PO to change the vendor, the parts disappeared when selecting a new vendor, even when the parts were associated with the new vendor. We fixed this issue, so that when Vendor Part Linking is ON, the added parts remain under the Parts tab if they are also linked to another selected vendor. Otherwise, the parts are removed when changing the vendor on the purchase order.

When Vendor Part Linking is OFF, all parts remain under the Parts tab, and no parts are removed when changing the vendor on the purchase order.

53328 Work order tasks don't delete from the list when you click "Delete" [122414]

The reason work order tasks were not being deleted is that they had been added to work orders.

It is intended functionality to prevent tasks from being deleted if they are being used on one or more work orders. To let users know why the tasks cannot be deleted, there is now an error message with the details:



53329 Branch on PO disappears [122202]

We resolved an issue found when delivering a purchase order with items, parts, or part kits, the branch assigned to those items, parts, or part kits was being removed.

53416 Can create a customer with an invalid phone number, but then when you make a proposal it won't save [123401]

We changed fields to prevent users from entering spaces in the phone fields. These changes apply to the following pages:

- Custom Fields
- Stages Phone
- Customer Bill To Edit
- Customer Detail Edit
- Customer Site Detail Edit
- Customer Wizard
- Customer Wizard Site
- Contact Add/Edit
- Lead Add/Edit
- Lead Contact Add/Edit
- New Customer Registration
- Company Info
- User Add/Edit
- Vendor Add/Edit
- Work Order Add/Edit
- Customer Portal Edit
- Account Details
- Authorities Add/Edit
- Proposal Add/Edit

53482 Auto pay transactions still run even if invoice is deleted [123479]

Transactions were not previously voided when an invoice was deleted. This has been fixed. Also, navigation returns users to the customer details page once an invoice, which was navigated to from the customer details page, is deleted.

53524 Open appointments count on work order is incorrect [123691]

To address this, the filter is now applied on the backend instead of the frontend, so that the data received from the query only contains open appointments.

53590 History does not display the tax changes correctly [124019]

We resolved this so that the history of IDs (such as Item Id, Recurring Reason Id, Category Id, etc.) display more meaningful values to users.

53800 When you delete an item/part type or sub-type, it doesn't actually delete [124903]

We fixed this issue so users can delete an item/part type or sub-type.

54029 Cannot change a work order type when creating a new work order [125681]

We resolved an issue users had with changing the work order type on a new work order.

54306 Late fee invoice generated but late fee is not removed from account [125950]

We fixed this issue; when using batch payment to pay the full late fee, the late fee amount is now updated on the customer.

54393 Setup > Customer Info tab is showing a different company's information [126438]

We fixed an issue where the Company Info page (Setup > Company > Company Info) would show the incorrect information.

54592 Cost on WO vs PO [127069]

We resolved an issue where the part costs on work order purchase orders were incorrect.

Internal Changes (not on customer release notes)

50749 Change Order Part Tax Rate issues

When adding a change order part, the grid was not showing the tax rate. Also, editing an existing change order part quantity or rate and saving the part did not change the tax amount in the parts grid. We fixed the change order tax rate and tax amount issues.

50753 Can't set a Phase on a New Change Order Part

Adjusted backend API to pull workOrderTypeId so that phases are fetched correctly for a new Change Order.

53129 Work order revenue report data filtering issue

On the work order revenue report, no data was displayed when selecting all options: invoiced, open, voided work orders. (In AlarmBiller, only one option is clickable at a time.) We resolved this by changing the checkboxes to a dropdown for work order status selection.

53172 Can't set Custom Grid Layout as Default

Default Layout is not saved on any grid that has Custom Grid Layout option (button on a right top corner of a grid). Made adjustments to backend service use repo.Find instead of repo.Get so that entity is tracked before calling UnitOfWork.Complete()

53260 Revert Proposal Item Location/Zone field additions

We reverted changes for proposal items that were added in user story 51647 (for release 5.3.42). Proposal items no longer have the Location and Zone fields.

53292 WO is missing template when created from a proposal

When a work order was created by marking a proposal Sold, there was no template selected by default. Fixed by these:

- Automatically assigning a default Work Order Template ID when a Work Order is created from a Proposal.
- If no Work Order Template is specified, Managely retrieves and uses the default Work Order Template to ensure consistency.

53301 Issue in Work order email content

When a work order was delivered through email, the email body did not contain any information. It was just a template with no information on it. Fixed the issue with the work order where incorrect XML was being generated from the cf_form templates; replaced it with ConstructWorkOrderXml. Now, the email templates populate correctly with customer information.

53324 Multiple Forte accounts related issues

Both of the following bugs were discovered when there were multiple Forte accounts (setup -> utilities -> eCheck/CC).

1) If there was no account set as the default (or the default account was not available/closed), then when trying to add a new payment method, a "blank" account was automatically created.

Managely no longer creates a "blank" account when trying to add a payment method to a non-functional account. (It will still show an API error.)

2) When toggling on the default for a Forte account, other existing default accounts were not toggled off. There should only be one default account at any given time.

When setting an account as the default, Managely will un-default any other default accounts.

53398 Missing Branch for Prospects

When a prospective customer was created, no branch was linked as we did not have a branch field on the Lead page. We added Branches to Leads.

53506 Proposal Approval workflow issue when sending eForms

When a proposal is already approved and Accepted from the customer, It should not go through approval process again. Users should be able to directly mark it Sold. Made changes in the backend to avoid validation if proposal does not need to be approved.

53625 Proposals issues

Made changes in the frontend and backend to fix these issues:

Proposals with status action types of “ReadyToSubmitEformAcceptd” or “ReadyToSubmitEformPending” are not displayed in Proposal listing.

The Department field was missing on the Proposal Review screen.

53633 UI & PDF Shipping Method text format Inconsistency

Some shipping methods were displayed in uppercase in the PDF, while others were in lowercase. Changes were made in the backend as well on the frontend. Also, Shipping Couriers name was not displayed properly on the PDF or on UI.

53655 Dealer email field not marked as required

For the user profile, the user profile email address is now a required field. This matches AlarmBiller.

53677 Un-saved changes popup issue

Made changes in the UI to the department-detail.component.ts file. In this, the tryNavigateBack() function was always returning false, which was causing the pop up to appear two times. Fixed the logic in it, by adding a "return true" statement. This resolves these issues:

The unsaved changes popup was displayed on the add department page.

The Edit and Delete buttons were shown on the add department page.

53742 Warehouse tab count issue include inactive record

The warehouses tab showed both active and inactive warehouses count. Fixed: On PartMappingProfile.cs, while creating a map to get the warehouse count, we exclude the warehouses that are inactive. Handling the count for inactive warehouses on the front-end in these files: warehouses-part-grid.component.ts, part-details.component.ts, and part-details.component.html.

53864 Payment button on Transaction screen redirects to Home screen instead of Payment Details screen

The Payment button on the Transaction screen is supposed to navigate the user to the Payment Details screen. However, clicking the button incorrectly redirects the user to the Home screen. Changes done on the frontend for the transaction screen redirect issue.

53881 Handle HTML response from forte service when deserializing response

When deserializing Forte responses, the expected response was assumed to be in JSON format. However, sometimes the response was in HTML format, likely due to returning an error page. To get a more meaningful understanding of the underlying problem, we should handle this scenario and throw the error received by the server. To address this, we added error handling when deserializing Forte response with HTML media type.

53924 Filtered branch data not shown on detail page

When a specific branch was selected in the branch filter and its detail page opened, it displayed data for all branches instead of showing the details for the selected branch. Fixed: Changes done in Stored Procedure for filtering of data based on branch name.

53993 Work Order Parts issues

Adding a part to work order parts grid did not work:

There were some UI issues displaying action buttons; and the second part you would try to add afterwards again would not even add that part to the grid. Fixed by making changes to fix work order parts UI issues.

Opening an existing work order that had at least one part and navigating to the parts grid would throw an error. Fixed by making an adjustment in work order parts projection mapping to use new SalesTax instead of rSaleTax.

54015 Proposal “Override Template(s)” option shows all template types

When selecting the “Override Template” option to print, all templates (like invoice, credit, work order, contract, etc.) appear. Selecting these results in an error. Changed the front end so that only the templates related to the proposal type will now appear.

54022 Parts total comes back after removing all the parts

When all the Work order parts were removed, parts totals were still displayed. Resolved by adjusting the CalculateWorkOrderAmounts API to not fetch parts if an empty list of parts is passed intentionally.

54038 Duplicate defaults templates are showing

Duplicate default templates were showing. Made changes in the backend to update the migration script to avoid the duplicity of default templates.

54046 New work order cannot be completed

There was an error if trying to complete a new work order before saving it. Resolved:

- Added a conditional check for updating or inserting invoices.
- Introduced a conditional check in DealerInvoiceService.cs to determine whether to update an existing invoice or insert a new one based on the InvoiceId property. If InvoiceId > 0, the FindAndUpdate method is called; otherwise, the Insert method is used. This prevents duplication of existing invoices.

The issue was with the new template engine changes, when saving the document, we were doing an insert statement and saving the invoice in the process before the commit.

54131 Changing Work Order Type

When changing the work order type from Direct Expense to any other type in edit mode, the combo box remained set to Direct Expense. Resolved by changes to trigger parts fetch on type change.

54210 [Dealer] RMR Problem Generating

Updated how we are instantiating our DbContexts so it can more easily be mocked. Replaced the IDealerConnectionStringService injection with the more standard DbContextOptions injection. This lets us more effectively unit test the DbContexts.

Added an interceptor to EF that, prior to save, checks if the tracked entities have any string properties that have a maximum length. These are either defined by the StringLengthAttribute, the MaxLengthAttribute, or the .HasMaxLength() property configuration in the EntityTypeConfigurations (sometimes also called Maps).

54213 Problem Updating Manufacturer

In .net 8 when updating some entities the update is not working and reverting to the old state. Fixed by ensuring that Manufacturer gets added to the context, since we do not track them automatically anymore.

54255 [Dealer] RMR Error

This Avalara error on one account caused their batch to stop running.

Now preventing RMR from failing if a single record throws an exception (previously, the commit happened after the try/catch, but since the catch does a rollback, this was causing the commit to fail and bubble up an exception outside the foreach).

Adjusted External Reference logic. It should be treated as a duplicate if the ExternalInstance matches and the External Key matches for a given instance, or also if the ThirdPartyId matches instead of the ExternalInstance, but this case is unlikely to ever happen, as there is no code that creates an External Reference using the ThirdPartyId anymore.

Added logging to catch the issue with [dealer’s] one customer that caused it to fail.

54322 DockerBuild Error in Dynabill

Linux was not compatible with this code design. Updated design now builds.

54362 Managely Version

Managely Version showing extra characters when it should only show 5.3.43.17. There was a change from the .NET side that changed what was returned. Added parsing to just display the necessary version number.

54475 Voided WO shows on Sites/WO Grid

Voided work orders were showing on the sites/work order grid and the status was not correctly showing "Void". These work orders should be filtered out and show on the completed/closed work orders grid.

The work order tab grid on the Customer and Site details page now filters out voided work orders by default. The voided work orders are displayed only if the "Show closed work orders" option is checked.

54476 Issue Parts Message when Voiding Work Order

We updated the confirmation message so that it no longer mentions returning issued parts if the dealer is on Essentials; if inventory disabled; or if the work order has no parts. In all other cases where there are parts that can be returned, the message will notify the user as before.