Managely Release Notes

April 2025

Version 5.3.46.10 INTERNAL COPY

NOTE: This is a preliminary version of the release notes. The listed features are targeted for this release; however, not all features are guaranteed to be in the final release. The final release notes will have the finalized list of features.

Contents

Enhancements

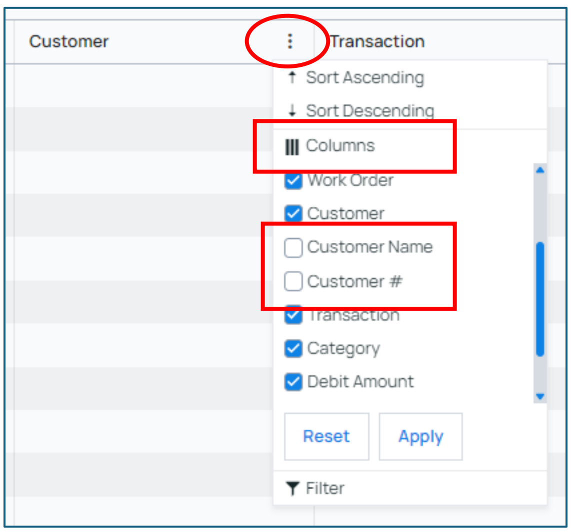
GL

53740 GL Grid Column Changes

We added the Customer Name and Customer # columns to the G/L account page. These columns are hidden by default. Users can show these columns:

Open the GL account page (GL > GL Register > Account Number hyperlink)

Click the three dots beside any column name.



Click **Columns**.

Select the checkboxes for **Customer Name** and **Customer #** (if needed).

Click **Apply**. The menu closes and the grid shows the Customer Name column and Customer # columns.

In addition, we made these changes:

- We added the Customer and Transaction columns. These are visible by default. The Transaction column is a hyperlink to the entry details.
- The Debit Amount, Credit Amount, and Balance columns are fixed to the right side of the grid. These are always displayed. The other columns are scrollable from left to right.

System-wide

55842 Dropdown Sorting and Item Code Addition

The contents of dropdowns are now sorted alphabetically with any numeric values listed first to help users find and select options more efficiently. Item codes are displayed alongside item names in item-related dropdowns to allow for better identification, reducing confusion and errors.

Application Corrections

52250 Customer payment total - late fee [00119826]

We fixed an issue so the late fee shows in the invoice total.

55616 Allow for letters in the phone number extension field [00130597]

We removed the restriction to only allow numbers in the contact phone extensions.

55798 Inconsistencies with formatting: customer wants $ on both parts and RMR [00131137]

We added the $ symbol to the Monthly Recurring Fees on invoices.

55806 Vendor address (city state zip) are not pulling into template [131123]

When selecting to add the vendor address to a template, the street address pulled but the city, state, and zip did not pull in.

We added the vendor city, state, and zip code to the “To” section of the Default Purchase Order Template.

55813 Naming convention is wrong on eForms: vendor # & customer # [131122]

The Vendor # was not in the shared data as an option to add. Customer # was the only option. When selecting customer number, the vendor number displayed in words. However, the eForm pulled in the customer number under the vendor.

The Vendor # field on purchase order forms now correctly uses the Vendor Number.

55817 Fonts and boxes are not lining up on default proposal [00130724]

We fixed the alignment issue of text in the template engine and updated the default template to fix other formatting issues.

55975 Customer should not have the ability to remove late fees in customer portal [131738]

We removed the On Account switch and disabled the Late Fee textbox when payments are accessed via the customer portal.

56023 Breaks disappear if you edit them [131866]

We fixed the issue of appointment breaks of previous appointments being deleted when a new appointment was added.

56068 Part Kit not showing item part code on invoice – it's blank [00131914]

We fixed this issue so that part kit codes appear on invoices.

56235 Copy proposal, the proposal is showing one customer, but when clicking on the proposal showing the original customer you created the copy from [132422]

After copying a proposal, clicking on the proposal showed the original customer the proposal was copied from. We fixed this issue.

56749 Batch payment failure [00132969]

We addressed a situation where the **Apply** button would remain busy if an error was returned from the server. In this case, a user had paid the late fee twice for a customer, causing an error. The user believed the system was still processing the task because the button remained busy. Refreshing the page was required to reset the button, and if the user had not saved their progress, they would lose their work.

Internal Changes (not on customer release notes)

55768 Part Pricing Levels -- Labor Units field giving an error when entering a decimal

On the Part Pricing Levels page, the Labor Units field gave an error [Http failure response for https://api.dynabill.com/graphql: 500 OK] when entering a decimal.

Made changes in the backend to allow decimal input in the Labor Units field under Part Pricing Levels.

56200 Grid action buttons in the appointment break editor are not showing up in dev environment

Grid buttons with kendoGridCellTemplate directives did not display in dev environment when a kendoButton directive was also included on the same element in the Appointment Break Editor, thus eliminating the ability to edit or delete breaks.

Removed kendoButton directive from the buttons inside kendoGridCellTemplate, as the existing directives for kendoGridCellTemplate (which are kendoGridEditCommand, kendoGridRemoveCommand, kendoGridSaveCommand) already provide button functionality.

56248 RMR history- Last invoice date issue

The last invoice date is shown as null. Made changes in the backend to display 'blank' instead of 'DateTime&null' in the RMR history.

56568 Critical notes do not pop up when you open Proposal detail page

When opening the proposal detail page, the critical notes for the customer did not pop up as expected (like AlarmBiller does). We added critical alerts to the proposal details.

56576 make-time-zone-drop-down-searchable

The time zone dropdown list throughout the application is now searchable. The following is a list of where the time zone dropdown appears throughout the app:

- User Profile
- User Manager > Users > Edit
- User Manager > Custom User Roles > Edit
- CRM > Customers > Edit
- CRM > Customers > Sites > Edit
- CRM > Customers > Add New Customer > Customer Wizard (Customer section)

- CRM > Customers > Add New Customer > Customer Wizard (Site section) - is Use Customer Address is turned on, the time zone should match the one selected in the Customer section of the wizard
- The login page for New Customer Registration (not a required field here)

56633 Add new proposal issue

On CRM > Leads, clicking the new Proposal button caused an error, and the secondary lead dropdown did not have any option to select. The issue was caused by a date formatting function (ToShortDateString()) that isn't supported in the database. Previously, name formatting for the lead dropdown in the Create Proposal dialog on the Leads page was handled on the backend. To resolve this, we moved the formatting to the frontend.