Managely Release Notes

March 2025

Version 5.3.46.7 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

CRM

55830 CRM 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.

These are the affected modules:

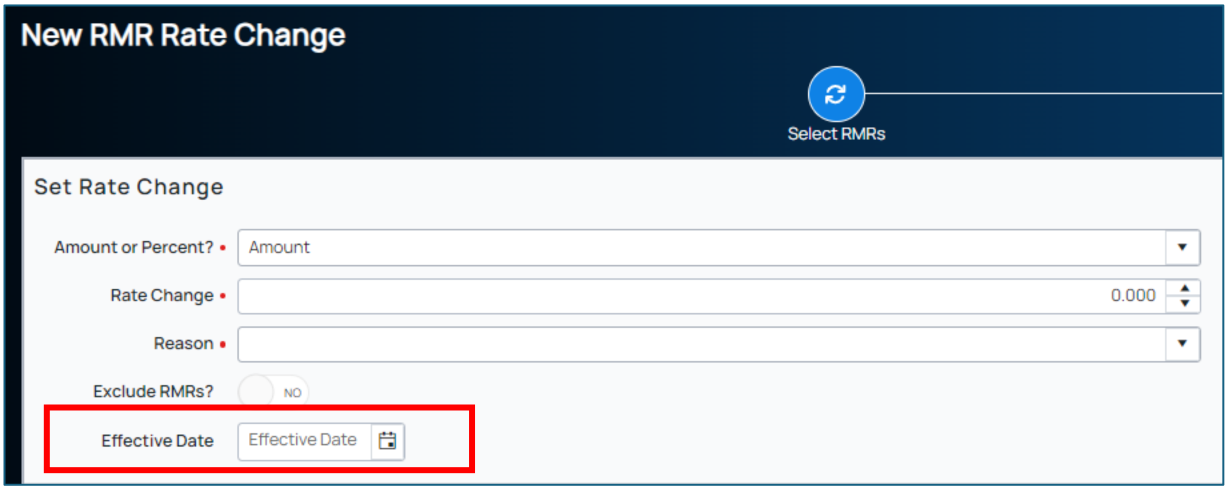
- Customer Wizard
- Customer Edit
- Site
- System
- Lead
- Contract
- Proposal

Accounts Receivable

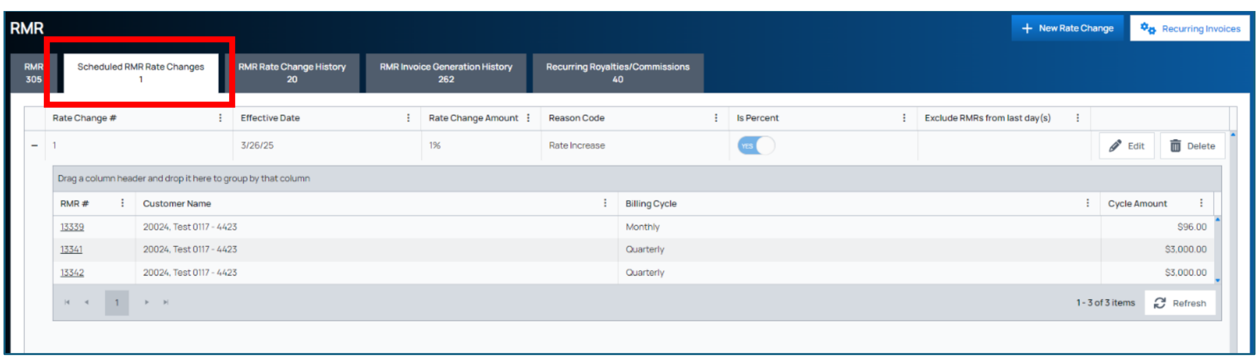
47508 RMR Rate Change [97282]

Users can specify an effective date for a rate change so that they can set up these rate changes in bulk in advance of the change date. This is to save time and the risk of making a rate change effective before the desired date.

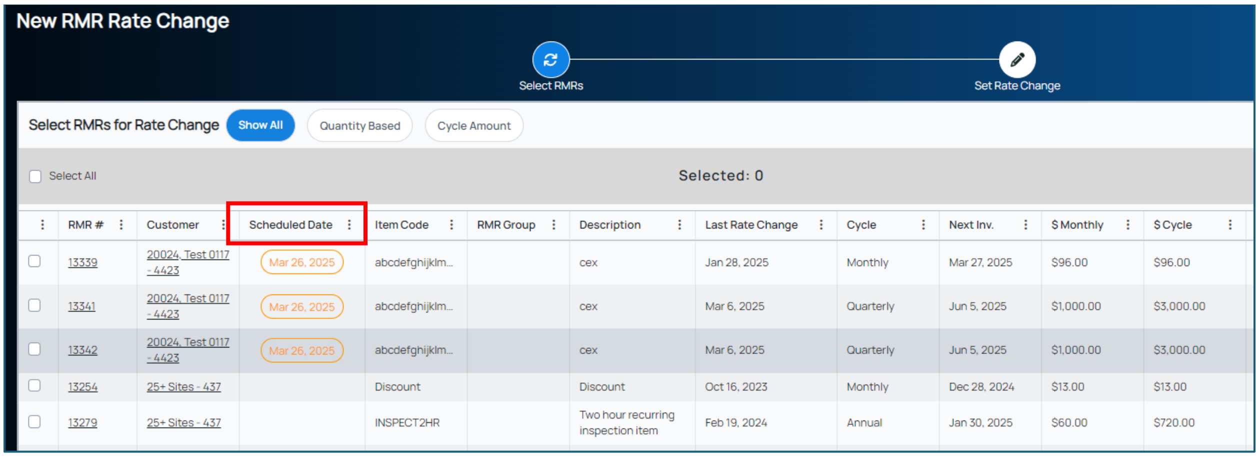
When creating a new RMR Rate Change, there is now the option to select an **Effective Date**, which will schedule the rate change to be applied on that date:



There is also a new tab called Scheduled RMR Rate Changes (Accounts Receivable > RMR) that shows all scheduled rate changes. Users can edit or delete the rate changes before they are applied on their effective date. Users can expand the rate changes to show all associated RMRs that will be affected by the change:



The grid to select RMRs for rate change now has a column called Scheduled Date that indicates any scheduled rate changes for that RMR. An RMR can have only one scheduled rate change at a time. Attempting to schedule another one will display a warning message:



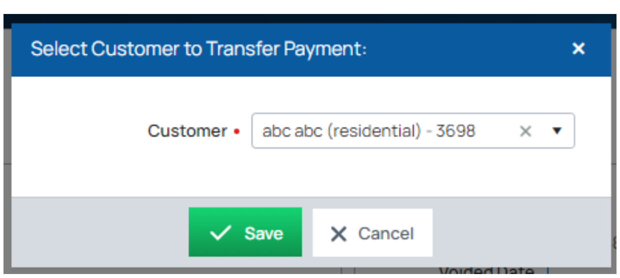
Users can apply a rate change immediately by leaving the Effective Date blank on an RMR that has one scheduled.

53199 Transferring Existing Unapplied Cash to Another Customer [121955]

Users can now transfer an existing payment from one customer to a different customer. This helps in situations where a payment was entered for the wrong customer by mistake or if a payment was entered for a master customer and later needs to be transferred to a child customer.

On the payment details page (Accounts Receivable > Payments > Deposits > Batch # hyperlink > # hyperlink), there is a **Transfer** button:

Click this button to choose another customer to transfer the payment:



Note: Only payments with $0.00 applied amount can be transferred. If there is an applied amount, un-apply it before transferring.

55359 Removed Filtering and Sorting Options for Custom Fields Columns in List Grids

For customers, sites, systems, work orders, proposals, and RMR using custom fields, we removed the filtering and sorting options for these columns if users add these columns to grids. Filtering and sorting the custom fields options was causing an error.

55422 Percentage Being Billed for Displayed Items and Parts in Progress Invoicing

Customers receiving progress invoices (Accounts Receivable > Invoices) will now see a percentage being billed for each item and part on the invoices. This helps them see what portion of each item or part is being billed compared to the total amount.

A new column labeled "Percentage Being Billed" was added to the invoice printout. This column appears only when progress invoicing is applied. The column is placed next to the Quantity and Rate columns for clear readability. Qty (quantity) and Rate show as the full amount and the total reflects the percentage being billed.

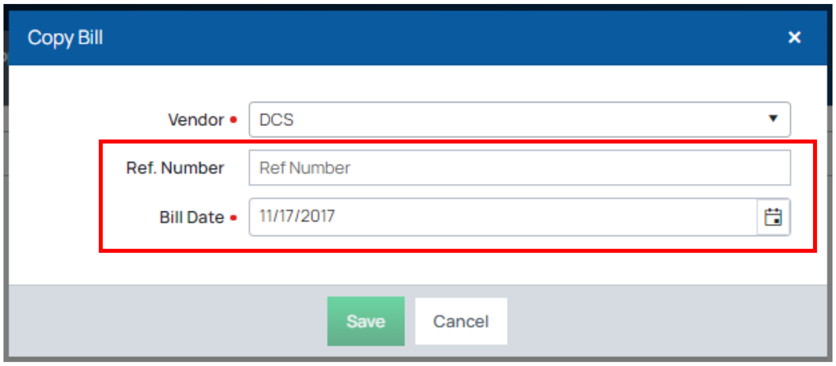
Description	QTY	Rate	Percentage Being Billed	Amount
Bucky Barns, 8401 Chagrin Rd, OH				
Service Fee	1.00	¤50.00	1.8671 %	¤0.93

To see this column, be sure the template used for the invoice has the Percentage Being Billed added.

Accounts Payable

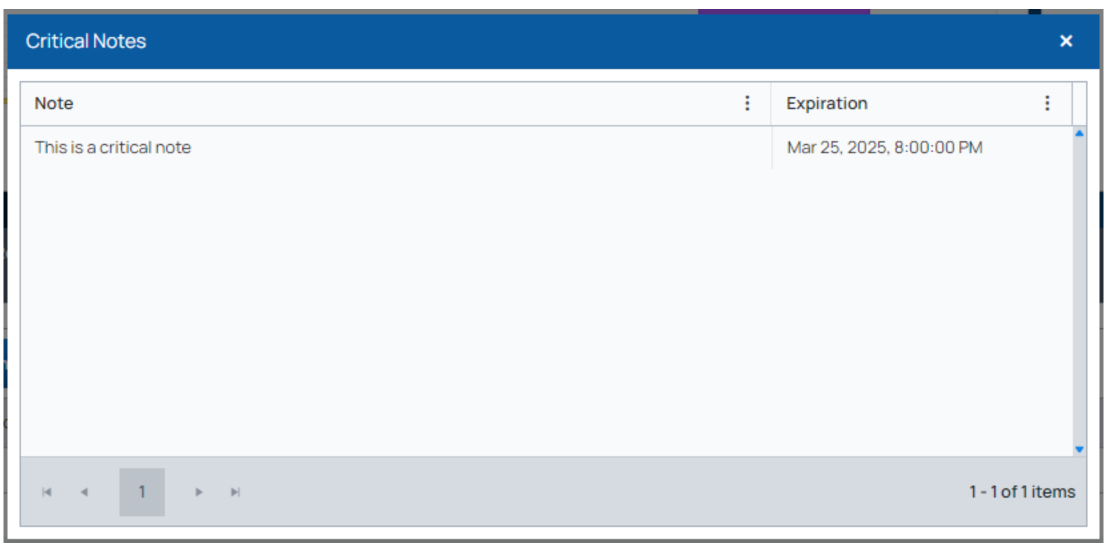
49683 Support Copying Bill To Originating Vendor

When users copy a bill (Accounts Payable > Bills > Reference Number hyperlink > More button > Copy) to the same vendor, they can change the date and reference number of the bill. This is to help users save time copying recurring bills each month. On the Copy Bill popup, there are two new fields: Ref Number and Bill Date:



55473 Critical Notes Appear on Vendor Detail Page

If vendors have critical notes added, these will appear on the vendor detail page (Accounts Payable > Vendors > Vendor # hyperlink).



To close the note, click the X in the top right corner of the Critical Notes window.

To add critical notes, open a vendor detail page.

Click the Notes tab and click the **Add Note** button.

Type the note and choose Critical in the **Type** field. Only critical notes appear when users open the vendor detail page.

Choose an **Access Level** and type an **Expiration Date**, if needed. Save the note.

GL

55846 GL 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.

These are the affected modules:

- General Journal Entry
- Bank Accounts
- Branches
- Add GL Account
- Add Credit Card

Application Corrections

51545 Customer name field not showing capitals [115788]

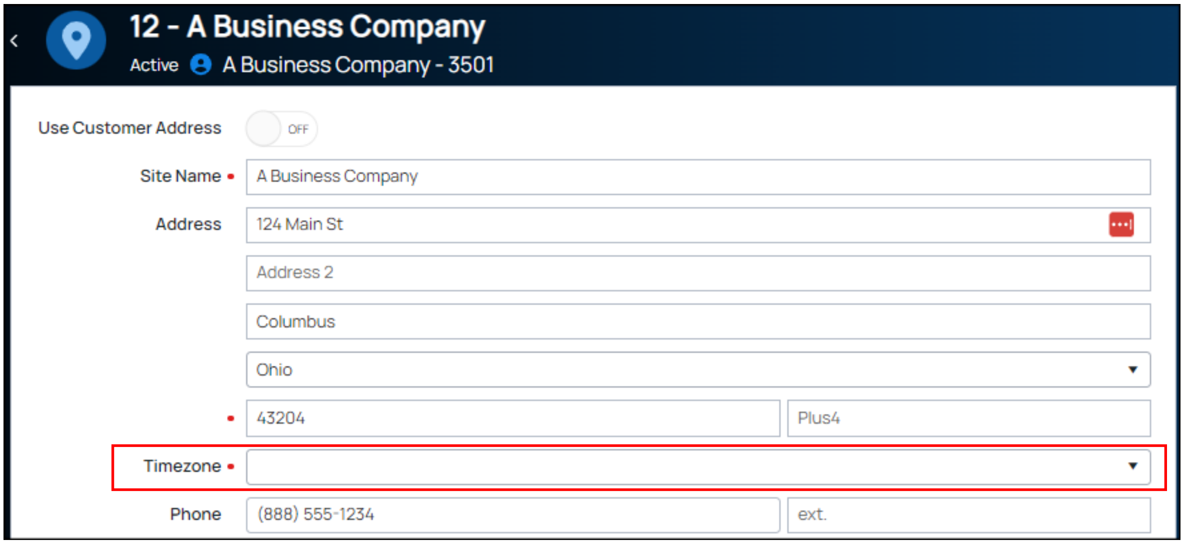
We corrected an issue of the customer names not showing in capitals as typed.

52839 Calendar showing incorrect appointment number and displays appointment in UTC instead of CST [121030]

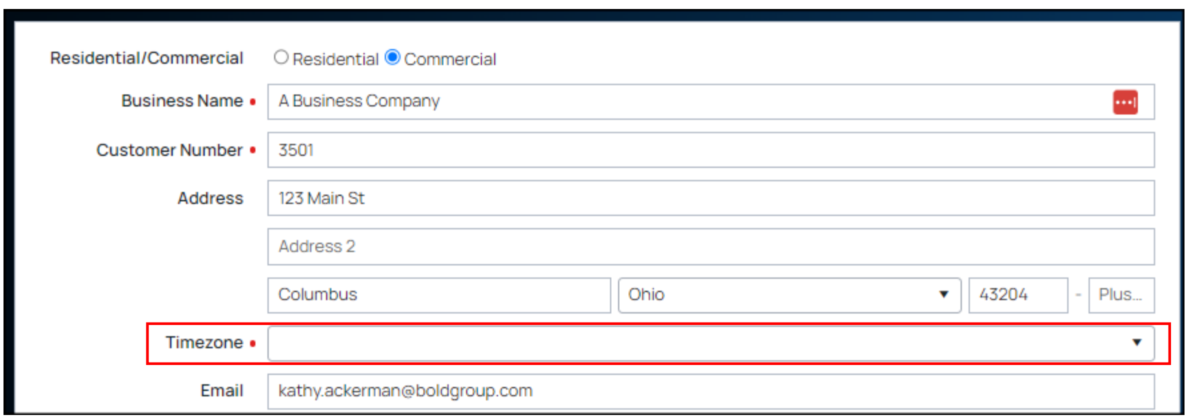
Appointment reminders that were emailed to customers displayed the incorrect appointment number and the time was in UTC instead of the end-users time zone.

We added a Time Zone field to all Site add/update forms, as well as all Customer add/update pages that will be required fields moving forward. Once a time zone is defined for a site or a customer, it will be correctly reflected in the email (The logic will first try to use the customer portal user's time zone, then the site's time zone, and lastly the customer's time zone). If no time zone is defined for any of these, the server's time zone will be used as fallback.

Customer site page:



Customer page:



For the time zones to reflect the customer's time zone, the customer's time zone must be set, either on a customer user, the customer, or the site for the appointment. It is important to actively make that change in Managely.

Appointment confirmations (from emails) now work when customers are not signed in.

When All Day is selected in the appointment, the appointment details now include the start date as well as the end date. This is also true for appointments that are not set to All Day but start and end on different days.

The appointment time range only showed the default 120 minutes for customers when the All Day option was selected, and the All Day text was left out of the appointment details in the email. These are now fixed.

52843 When adding parts to work order, I cannot see the “Name” column of the part [121120]

We fixed the width of the grid for the part picker. This resolves the issue of the Name column disappearing when the screen is small from shrinking the view in the browser.

53261 Can’t bill progress invoice [121930]

Users were getting an error when creating a 10% invoice after the 50% on the work order was already paid.

We fixed the error users received when creating another progress invoice after half on the work order was paid.

53584 Invoices based on percentage - display of contents in invoice

We made changes to the default invoice template based on the following points:

- Added a Percentage Being Billed column in the Charges grid
- Displayed the actual rate of part/item/part kit under the Rate column in the Charges grid
- Updated the amount based on the progress invoice percentage
- Show/hide the Percentage Being Billed column based on the progress invoice or other invoices

53697 Appointment confirmations emails are being sent to the clients with the wrong time [124435]

Confirmation emails were displayed in UTC time instead of the customer’s time zone.

We resolved this issue so confirmation emails are displayed in the customer’s time zone.

53995 Turning off the options for delivery method of mail creates a data issue [123393]

On Setup > Company > Preferences > Site Settings tab, users could turn off the option for **Disable Mail Service** (the Sebis option) without making any changes to customers already on that delivery method creating data issues.

We added a dialog to the action of disabling the Mail Delivery Service. The dialog lists the implications of this action, which changes the delivery method of all customers who have Mail selected as the delivery method to Print. We also added a help tip next to the switch to inform users before changing the switch.

54985 Deposits within the overview of a proposal are displaying the item description and need to display the item code [128180]

The dropdown lists for the proposal items now show the item code and description.

55096 If you forget to enter the reference number you cannot go back and add it after the bill is saved [128544]

We changed this so that users can edit the **Ref. Number** (reference number) field.

55223 Autopay date on invoice incorrect [128817]

Auto pay invoices were set to auto pay on the 1st day of every month, but on the customers' invoices under Do Not Pay it stated it was going to come out on the 16th day of the month which was incorrect.

We fixed this to use the auto pay's date.

55225 The time zone is off by 8 hrs [129031]

We fixed the time zone shown in appointments.

55265 Business name acronyms not showing in all caps [00070865, 00115788, 00129186, 00132614, 00132825]

When users entered an acronym in the Business Name field in all caps, it did not reflect the all caps when they viewed the customer.

The business name now displays the same way it is typed in the textbox.

55298 Can't sort by site number [129295]

We changed the sorting to sort by number where possible and then by anything else (for example, alphabetically).

55361 Customer portal default work order type and default work order status do not default [129441]

We corrected this, so in the customer portal, during new work order creation, if the user is a customer, then work order defaults come from the Settings > Company > System Defaults page, **Customer Portal Work Order Type** field and **Customer Portal Work Order Status** field.

55362 Filters in the grid of the collections queue do not work correctly and throw errors [129446]

The filters in the Collections Queue grid did not work correctly and caused errors.

We fixed the errors in the filters for the collections queue grid.

55407 Customer and technician notifications have the "when" time off by 6 hours [00129620, 130421]

We resolved the issue of customer and technician notification times being off by six hours.

55613 Work order notes do not allow for a carriage return [130596]

We changed all notes throughout Managely (not just on work order notes) to support line breaks (also called hard returns or carriage returns).

55614 Invoices are missing the description following the carriage return when migrated from AlarmBiller to Managely [130595]

Invoices that were created in AlarmBiller and moved to Managely during a conversion were missing all the information that followed the carriage return. The information was available when clicking into the invoice within Managely but did not display on the invoice.

We adjusted the template to show the additional lines.

55618 We have added .01 NON-taxable and yet it added .02 to my total [00130599]

We fixed the calculation issue.

55815 Work order number too close to border {131124]

The work order number could not be moved any further from the border, and the Delivery Date did not align correctly.

Users can now enter space in the text editor to move the work order number and it will reflect in the printed PDF file. Also, we updated the default template for purchase orders to include a space to move the delivery date from the border.

56028 Red font is not appearing when editing a static text box [00131551]

Templates & Forms > Templates > Templates tab > Design button > Tools > Add Text box > Edit text > font -- missing the color red.

We changed the controls for the font color so that users can choose by gradient instead of by pallet.

56194 Issue when an invoice is IMPORTED into Managely [130125]

Users were unable to import invoice terms in invoice uploader, causing invoices to import with the correct due date, but incorrect terms.

We fixed this issue to use the customer's default terms.

56258 AlarmBiller parity: when generating a lead primary salesperson and secondary salesperson do not get email notification [132410]

We implemented changes to trigger email notifications for the Lead Primary Salesperson and Secondary Salesperson.

Internal Changes (not on customer release notes)

54067 Issue with salesperson field in leads

In the Lead edit screen, the Salesperson field did not display the selected value, and the dropdown did not list values to select from.

We modified the TS code to fetch the correct Salespersons based on the department present in the Lead record. Assigned the default branchId to the lead branchId Lead/Create page.

55127 Forte UploadLocationId fails on null value column

When trying to update the LocationId for all aCreditCards and aEChecks (when adding or updating Forte Authorization), if any of the DB columns were null, this would break because the EF property was expecting a value.

Made the IsChecking field non-nullable in the database (it was not nullable in code but was causing EF issues when it was null).

Changed update logic for UpdateLocationId (for Credit Cards and EChecks) to use the UpdateFromQuery extension instead. While this bypasses EF, it is also faster, as it does not require a DB read to do the update. Since it bypasses EF, there are no notifications fired, but as we do not need to do anything when a location ID is updated on a payment method, there is no loss of capabilities.

The result will be a faster call whenever we update the default Forte Authorization.

55579 Page loads endlessly on clicking a null/undefined work order in the bills

When there was no work order attached to a purchase order or a bill, it was displayed as null/undefined under the Parts tab of the Bills. When a user clicked on the null/undefined hyperlink, the page loaded endlessly.

Front-end updates have been applied so that if a work order is null or undefined, an empty column is displayed in the Bills section.

Also, Work Order changes have been done to display the work orders in the Part tab.

55940 Next occurrence date issue

Recurring work orders with appointments — Next occurrence date that appeared was incorrect. It displayed either the current date or past date.

Updated the code for startDate and endDate as per nextOccurrence date in method GetCalendarMasterAppointmentsForAppointmentBasedRecurringWorkOrder of CalendarService.cs file.

55942 Scrolling issue

CRM > Departments: Zoom in screen to 125%, clicking on next tab or previous tab automatically scrolled to right side of the page.

Added an attribute [keepTabContent]="true" in kendo-tabstrip on department-detail.component.html.

55982 Incorrect appointment time for recurring work order

Incorrect time (UTC time) was displayed in the appointment grid for recurring work order.

Made changes to the frontend to fix the incorrect appointment time issue on the grid for recurring work orders.

55986 Critical note modal doesn't pop-up on opening a system

When a user added a critical note on a System and then the same System is re-opened; the Critical Note pop-up was not displayed.

Made changes in the frontend to display the critical notes at the customer system page.

56291 Error retrieving property 'CustoemrSignature.Name'

To handle the RuntimeBindingException meaningfully in C# when accessing properties dynamically.

56043 Recurring toggle & deferred income dropdown issue in items

The toggle button (Recurring) state was not saved while adding or updating the items.

Made changes in the backend to resolve the issue where item data was not being saved during add/update.

56075 RMR issues

Two RMR issues:

1. If there is data in the required fields, then the form should be saved successfully. The form was giving an error message.

2. On the RMR details page, Item description is displayed after the Roll up item. Expected: Sequence should be item, item description, roll up item for better understanding.

The first issue is working fine in EST time zone.

For the second issue, we updated the sequence of the item, item description, roll up item labels as per the requirement in the ticket. File updated: rmr-header.component.html.

56079 Part pricing levels: parts not getting displayed without refreshing grid

Parts were not appearing in the grid right away after added, users needed to refresh the grid to see newly added parts.

Made changes in the frontend and backend to fix this issue and made some changes to optimize the flow.

56119 Default branch does not auto populate from the system defaults at the time of lead creation

Modified the TS code to fetch the correct Salespersons based on the department present in the Lead record. Assigned default branchId to lead branchId Lead/Create page.

56416 Getting error on saving lead after removing secondary salesperson

An error message appeared when trying to save lead after removing the secondary salesperson.

Handled foreign key issues with the secondary salesperson field in the lead and made changes in the HTML and TypeScript files.

56448 Sorting not working

Fixed the sorting of default grid loading in Sites, Systems, Proposal, Work order, RMR, and Customers.