Managely Release Notes

May 2025

Version 5.3.47 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 > Customers

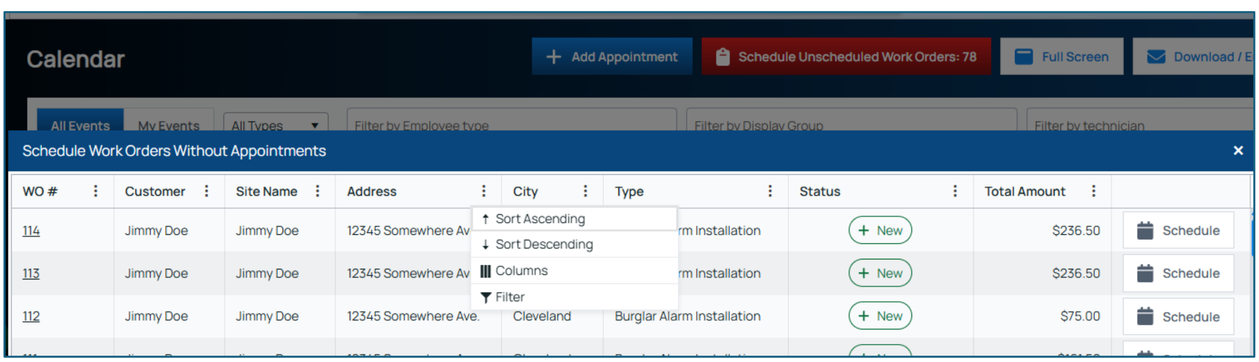
57177 Auto Incrementing Site Number on New Site [00118301]

When creating a new customer and customer site using the customer wizard, the **Site Number** field automatically starts with “1”. (For dealers familiar with the AlarmBiller product, this functions the same way as AlarmBiller.)

Calendar

56380 Added City as a Column to Use When Scheduling Work Orders in the Calendar View

In the calendar, when scheduling the unscheduled work orders (clicking the red **Schedule Unscheduled Work Orders** button on the top toolbar), the grid now displays the site Address and City. Users can filter and sort the City column.



Application Corrections

53381 Canceled RMR showing In Top 10 Customer Active Recurring dashboard [00122455]

On the home page, in the Customer PowerBI report tab, the Top 10 Customer Active Recurring card and its drill down report, were incorrect. These were supposed to show the top 10 customers by the total monthly amount from their active RMR entries. The report was incorrect in these points:

- It included canceled RMR records in its sum of the RMR monthly amounts.

- It included customers based on the total of their invoice amounts due instead of the sum of their RMR monthly amounts.

We fixed both issues.

53382 Top 10 Customer Active Recurring - report change [00122456]

The Power BI report widget Top 10 Customer Active Recurring should display in hundreds or thousands.

We changed how the values are indicated on the report. For any values over $1000, it will show as a multiple of 1000 with the K indicator. Any less than $1000 will show as the actual value. For example, if the top 4 are $11,000, $1,100, $100, and $50, they will be displayed as $11.0K, $1.0K, $100, and $50.

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 and the customer name now display the same way they are typed in the textbox.

55267 Dark mode BI dashboard illegible [00129014]

On the home page when using Managely in dark mode, some cards in the Summary PowerBI report tab were unreadable. There were also some inconsistencies in the other cards with displayed colors while in dark mode.

We fixed these cards so they are readable and fixed the color inconsistencies.

55406 Default invoice change [00128827]

The new customer template update feature was updating some customers but not all of them.

We corrected this so that setting a default template updates all customers.

57112 Terminating site [00134513]

Users were unable to make a site inactive that had a voided work order tied to it. We fixed this issue.

57259 The toggle switches on bank reconciliation need to be fixed [00134759]

While reconciling bank statements, if users selected the checkbox to the left of the Date column to select all items in the grid, they could not clear any individual checkboxes for items in the grid. Conversely if users selected all items individually, the select all checkbox to the left of the Date column was selected, and users could not clear the checkbox for any single item and needed to start over.

We fixed this so users can select all items and then clear checkboxes for individual items.

57269 Unable to reorder items within a group on proposal [00135168]

On a proposal, if there were multiple groups on the Charges tab, users wanted to reorder the items within each group but were unable to.

We resolved this issue so that if there are multiple groups on the Charges tab, users can reorder the charges in the groups.

57272 Templates text box needs to display the default font family and the default font size [00135264]

The templates text box should display the default font family and the default font size instead of displaying the value of the selected font family and font size.

We updated the font size and font list data source on the screen.

57361 Error message when copying site/system from one customer to another [00135446]

We corrected an error that users received when trying to copy a site and system from one customer to another by adding a site; using the Copy Existing Site feature; and checking both Copy Systems and Inactivate Original Site/Systems.

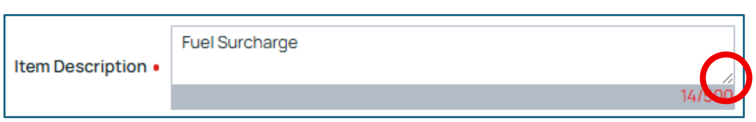
57439 Reordering Items within a group on a proposal is difficult [00135442]

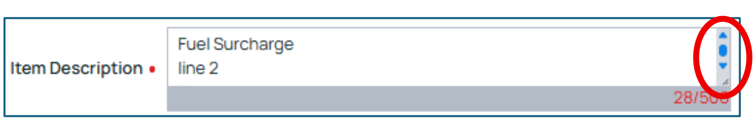
We resolved this issue so that if there are multiple groups on the Charges tab, users can reorder the charges in the groups.

57588 Item Description is a run on sentence and needs to be a drop down [00133995]

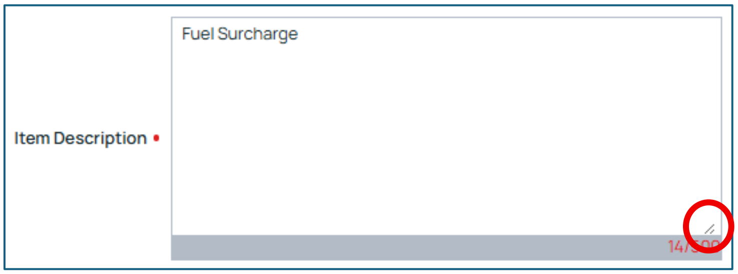
Item description should work in Managely the same way it does in the AlarmBiller product.

We changed text boxes to text areas for items, parts, and part kits so the Description fields look and act like this:





When a description has multiple lines, users can click and hold the mouse button to resize the description field to see additional text, or they can click the up and down arrows on the right side of the description box to scroll the description text.



We made this change in the following areas:

- CRM > Proposal Details > Edit Proposal > Add and Edit Items, Parts, and Part Kits
- Accounts Receivable > Invoice Details > Edit Invoice > Add and Edit Items, Parts, and Part Kits
- Accounts Receivable > Work Order Details > Edit Work Order > Add and Edit Items, Parts, and Part Kits
- Accounts Payable > Bill, Receipt, and Credit Details > Edit > Add and Edit Items, Parts, and Part Kits (Note that here the description cannot be changed, so the character counter at the bottom of the text area is not shown.)

Internal Changes (not on customer release notes)

54562 Change order timesheet progress invoice

Change Order Timesheets should be fully (100%) invoiced only when a change order is selected to be invoiced.

Adjusted the Work Order Invoicing functionality that is triggered when setting status of work order to Complete and when creating partial invoices through Billing/Invoices grid.

Adjusted Work Order Totals calculation logic to fix an issue where updating an existing work order was changing work order amount (in 54746).

54746 Work Order totals calculation issues

Fixed this issue in 54562.

55246 Customer site returns an error when it has an associated external reference with null ExternalInstanceId

This happened for sites with an external reference where the ExternalInstanceId field was null in the table aExternalReference. The easiest way to reproduce is to open the aExternalReference table in the Dealer database and find a record which has a NULL ExternalInstanceId and EntityId of 7, grab the value of the EntityKey property, and feed it directly in the address bar for the path /customers/sites/{EntityKey}.

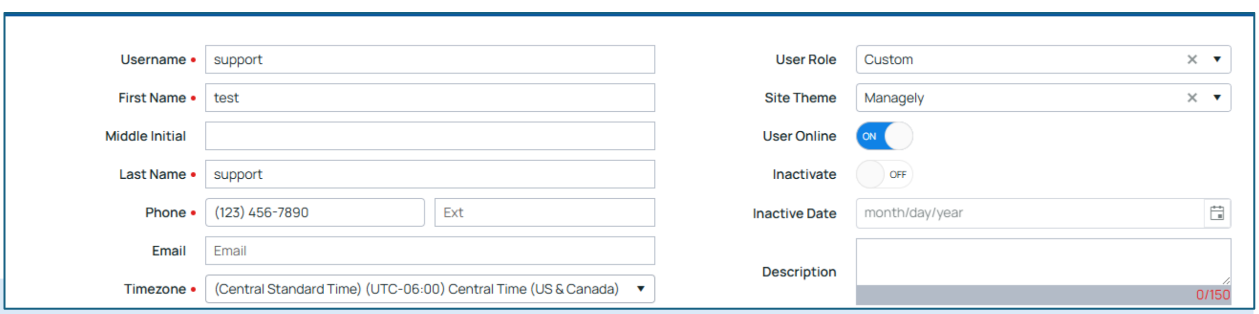
The External Reference View Model was decorating the External Instance Id as Required even though it was nullable. There are certain situations in which the ThirdPartyServiceId on this field are set and therefore, the ExternalInstanceId will be null, so we removed the Required attribute.

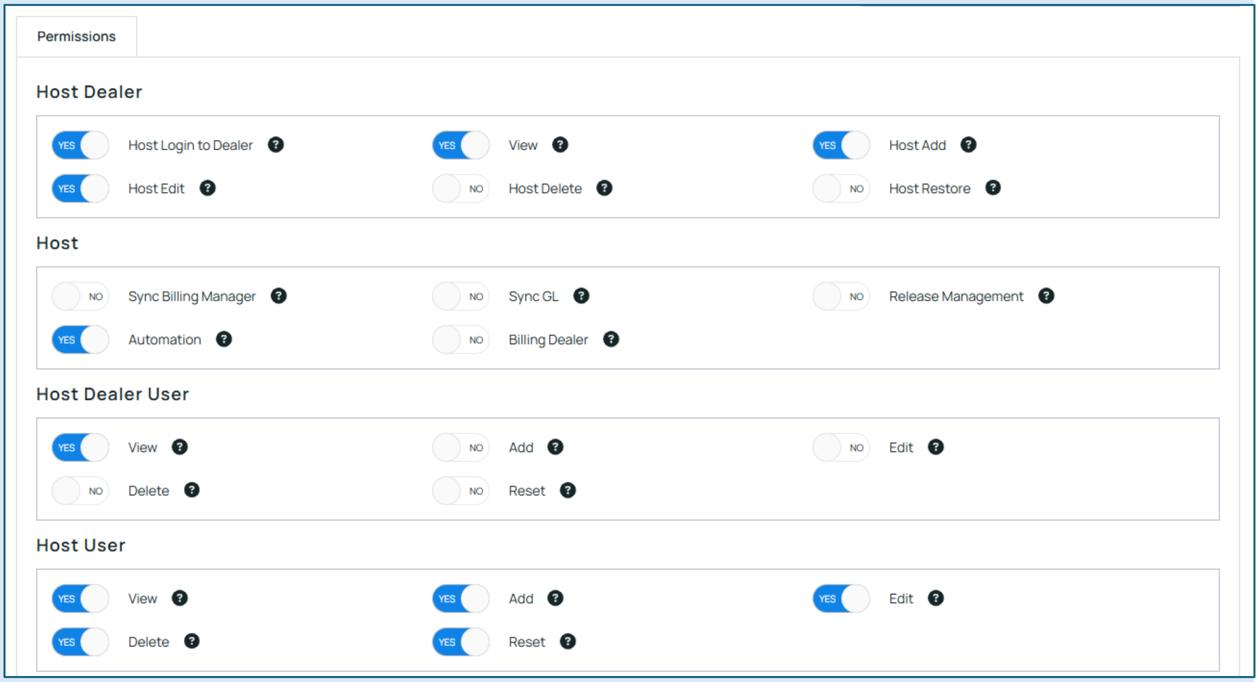
57178 Support lost the permission to see customers under the Collection queues for dealers [00134959]

Lost the ability to see the customers assigned to each collections queue in the dealers account. This makes support unable to assist customers with collection queues and identify issues, since further research cannot be done, only what is seen while on the phone with the customer.

We fixed this issue.

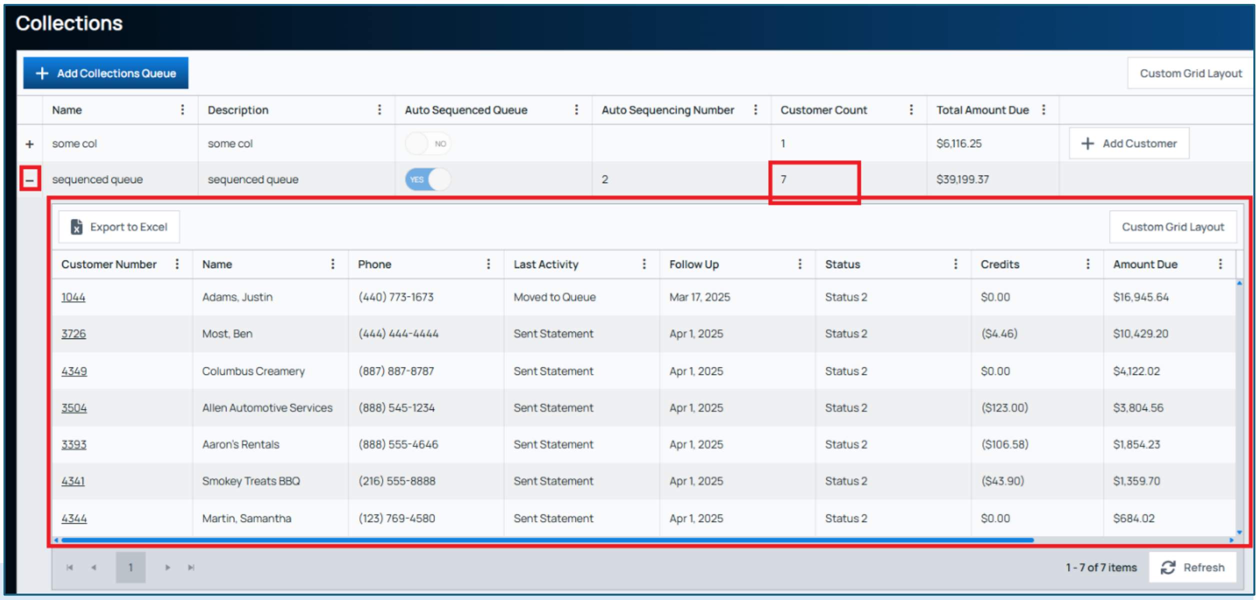
1. Log into Managely as an admin.
2. Navigate to Setup > Collections > Collection Queues.
3. For each collection in the table:
    a. Click the Edit button.
    b. Make sure there is at least one user under User Access. If there isn't, add one.
    c. Click Save.
4. Log out of Managely.
5. Log into Managely Host as an admin.
6. Navigate to Host Setup > User manager.
7. Click the Add User button.
8. Add a new user with Custom User Role and the following permissions.





9. Click Save.
10. Log out.
11. Log back in with the new user.
12. Go through the password change screen.
13. Navigate to Dealers.
14. Click on the relevant ID (usually 10000).
15. Click on Login to Dealer.
16. Managely will open in a new window.
17. In Managely, navigate to Accounts Receivable > Collections.

18. The collections table should now show the Customer Counts and each record with customer count > 0 should have a list of users when expending the record.



	Name	Description	Auto Sequenced Queue	Auto Sequencing Number	Customer Count	Total Amount Due	
+	some col	some col	NO		1	$6,116.25	Add Customer
–	sequenced queue	sequenced queue	YES	2	7	$39,199.37	

Customer Number	Name	Phone	Last Activity	Follow Up	Status	Credits	Amount Due
1044	Adams, Justin	(440) 773-1673	Moved to Queue	Mar 17, 2025	Status 2	$0.00	$16,945.64
3726	Most, Ben	(444) 444-4444	Sent Statement	Apr 1, 2025	Status 2	($4.46)	$10,429.20
4349	Columbus Creamery	(887) 887-8787	Sent Statement	Apr 1, 2025	Status 2	$0.00	$4,122.02
3504	Allen Automotive Services	(888) 545-1234	Sent Statement	Apr 1, 2025	Status 2	($123.00)	$3,804.56
3393	Aaron's Rentals	(888) 555-4646	Sent Statement	Apr 1, 2025	Status 2	($106.58)	$1,854.23
4341	Smokey Treats BBQ	(216) 555-8888	Sent Statement	Apr 1, 2025	Status 2	($43.90)	$1,359.70
4344	Martin, Samantha	(123) 769-4580	Sent Statement	Apr 1, 2025	Status 2	$0.00	$684.02

57466 Fix Avalara Production/Sandbox Setting

Updated the Avalara client package (BoldGroup.Integrations.Avalara) to use the latest code from Avalara.

Updated Managely to use that updated package, and cleaned up code, as the package now provides an interface so we do not have to wrap it locally.

Updated External Grid to handle binding of Boolean values better.

57516 Invoice pdf issues

Fixed these issues:

1. Renamed Percentage Being Billed column to Billed so it takes less space.
2. Used two decimal points for Percentage Being Billed (Billed) so it takes less space.
3. Charges had the wrong Percentage Being Billed and Amount displayed in the Invoice pdf for a Change Order Invoice. Note that other sections showed correct numbers in that pdf. Also, the invoice view itself before pdf generation displayed the correct rate and amount for the item.

57988 Work Order Recalculating Error

When changing the workorder type in edit mode, if the items grid goes from having items to no items, the total and grid total are not recalculated as expected.

Adjusted a work order amount calculation logic so that removed item/parts/appts/timesheets/RMRs for uncommitted work order are not fetched from DB for calculations.