



Managely Release Notes

May 2025

Version 5.3.48 **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.

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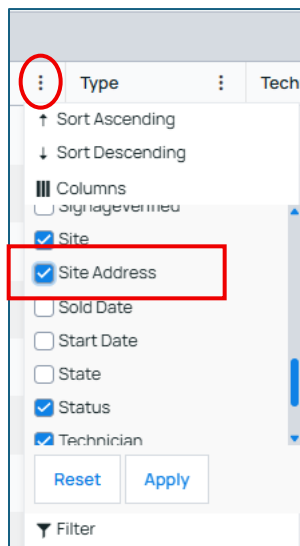
Enhancements

Accounts Receivable

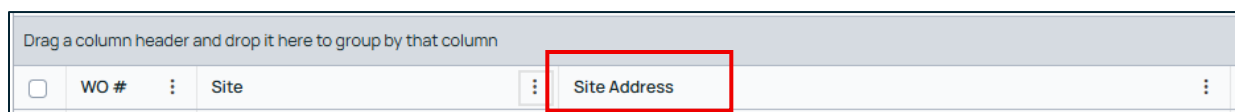
56066 Added Site Address Column to Work Order Page Tabs [131915]

We added the Site Address column to the Open Work Orders tab, Appointments tab, Closed Work Orders tab, and Void Work Orders tab on the Work Order page (Accounts Receivable > Work Orders). By default, this column is hidden. Users can add this column to the grids:

1. Click the three dots beside any column name.
2. Click **Columns**. This shows a list of available columns.
3. Scroll down to **Site Address**. 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.

55834 Accounts Receivable: Dropdown Sorting and Item Code Addition

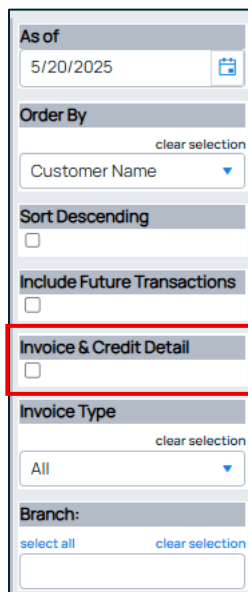
We added sorting functionality to dropdowns to help users find and select options more efficiently. Item codes will be displayed alongside item names in item-related dropdowns to allow for better identification, reducing confusion and errors. These are the affected modules:

- Invoices (and credits)
- Payments
- RMR (add and edit)
- Work Orders
- Calendar
- Collections

Reports

56199 Option to Show Invoice and Credit Details on the AR Aging Report

On the AR Aging Report (Reports > Accounts Receivable > AR Aging Report), we added an option to print invoice and credit details on the report.



The screenshot shows a vertical filter panel for the AR Aging Report. It includes the following sections: 'As of' with a date field set to 5/20/2025; 'Order By' with a dropdown menu currently showing 'Customer Name'; 'Sort Descending' with an unchecked checkbox; 'Include Future Transactions' with an unchecked checkbox; 'Invoice & Credit Detail' with an unchecked checkbox, which is highlighted by a red rectangular box; 'Invoice Type' with a dropdown menu currently showing 'All'; and 'Branch:' with a dropdown menu and 'select all' and 'clear selection' links.

If users clear this check box, the report will print a summary.

Application Corrections

55818 Invoice is creating second page that is blank [00130725]

We fixed an issue with the invoice template so that it no longer creates a blank second page when it is only one page.

56236 Display error with next RMR process generation screen - master invoices [132528]

When users manually processed master invoices after processing regular invoices, the Next RMR Process date was a month off. The date did not switch to the master invoice's next RMR process date; the date stayed with the regular customer processing date.

We corrected this so that processing master invoices after regular invoices will use the dates of older invoices of the master customer and display the date correctly.

56265 Specific Work Order: Completed work order and invoice was created but it did not close work order [00132408]

User reported changing the status of a specific work order to completed, which created the invoice but the work order did not close. They had to manually change the status of the work order to completed and close the work order.

We could not reproduce an issue described for the specific work order. However, we found that the dealer received an error when trying to print a different work order. The PDF file generation stalled while trying to pull work order with its many appointments. This only occurred on work orders that had too many appointments, items, parts, or part kits. In this case, the specific work order had hundreds of appointments. This correction fixes the Printing Work Order and optimizes the work order PDF file generation through the page itself.

56713 eForms issues with invoices and proposals [133615]

Users reported two issues with templates: on the invoice, they could not add the page number to the footer; and on the proposal, the \$ symbol was not shown when using variables to display the subtotal, tax, and total amounts.

For the invoices issue, the page number was not shown because it was only valid on page headers/footers, not the footer. We fixed this so the page footer and footer are available in all template types, for new and existing forms and form instances. We also fixed the height of the footer in the default invoice template, because one of the elements inside it was loading with an error due to extending beyond the height of the footer section.

For the proposal not displaying the dollar sign, this was fixed in a previous release and should be shown when creating a new copy of the default template (after clicking the Sync Default Templates button). However, we changed the way the dollar sign gets placed.

56802 New Timezone required field at customer & site level causes data error [134263]

When opening a customer, users got an error “Data is Null. This method or property cannot be called on Null values.”

This error was caused by a contact’s last name being NULL. A contact’s last name is required but was nullable in the database. Any entries where the last name was NULL caused the error. To fix this, we changed the database value of the field aContact.LastName to NOT NULL.

57268 Part code not on proposal [00135090]

When a part kit that had no Description was added to a proposal, and then printed, the Charges table on the form would display a blank for the Description column. We changed this so that the part kit code (as defined in Setup > Items & Parts > Part Kits) will be used if the Description is empty.

57752 When print previewing proposals, it does not print on my default template, I have to click on the override template and choose my default [136474]

When printing proposals (using the button in top right of proposal detail page), if the **Override Template** switch is set to NO, it will now use the default proposal template defined in Templates & Forms > Templates. Additionally, once a proposal has been printed, the template used is saved to the database, so the next time the proposal is printed, it will automatically use the previously chosen template. Users can select an override template to change to another template.

58151 Option to show credit and invoice detail on the AR Aging Report [00129498]

We updated the AR Aging Report (Reports > Accounts Receivable > AR Aging Report) by adding the option to include Invoice & Credit Detail; increasing the Branch Name column size; and fixing the issue of the Grand Totals running into each other.

58182 E-Form Issue [00137577]

Some issues users reported when clicking Templates > Design (on any template) > Preview — the logo was missing or misplaced; there was a second page but that second page could not be viewed when editing the eForm; or the page was duplicated.

We fixed these issues with the eForms.

Internal Changes (not on customer release notes)

55291 Unit of Work not saving previous state

When using the Update method on the new Unit of Work, the previous property values were not being tracked.

Now, when calling `_unitOfWork.Dealer.Something.Update(entity)` (or `.Host`), the original state of the entity is tracked prior to updating it. This will ensure that any handlers that check the previous state will still have the correct values.

56011 Loading Default Template Repeatedly Creates New Templates

The application previously would create the Default Templates if the existing Default Template count did not match the existing ones. However, in certain cases, there may have been duplicate default templates, so every time this logic ran, it created the default templates as well as additional documents for the logos. This changes the logic to only do it if the default templates are empty or are less than the expected count.

56715 Cash Based Sales Tax Report is off by a day [00133911]

Date issue discovered when comparing Detailed Deposits by Day to Cash Based Sales Tax Report. Report appeared to be off by a day.

Telerik Reports (or how we are using them) is not correctly offsetting dates. If you are inside DST (daylight savings time) and use a date-picker on a report to pick a date outside of DST, the offset will be off by an hour (the same for the inverse). When we convert that date to a local date, it will be off by a day (because it will become 23:00 the previous day). To correct this, we created an extension method that should only be used with Telerik Reports and applied it to the start and end dates for the Cash-Based Sales Tax Report.

58188 Vendor details page issue

The vendor details page was not opening. To fix this we updated and created new models related to Aging Reports. Now the Vendor details page and the AP aging report are opening.

58204 eForm PartKit itemPartCode issue

When the Charges table on a proposal template includes the ItemPartCode column, part kits were not displaying the part kit code.

We fixed this so part kits will properly load their corresponding code.