

# Managely - 5.3.3 Corrected Bugs - July 2021-Sept 16, 2022

01/05/2024 5:54 pm EST


ID	Title	Description	Closed Date
26784	Transaction receipt-void button functionality	Login->Customers listing->Customer details page->cc/echeck transactions->Transaction grid. Receipt, void buttons are not working	8/19/2022 15:17
27464	Reporting Date Range Day Increase	<b>Issue</b> When running a report for a specified date range, the report displays that date range in the upper right but advances both the start and end date specified by one day	7/22/2022 10:20
28842	Custom Fields not viewable on listing pages	<b>Issue</b> Cannot view custom fields on any listing page where custom fields are supported. Need to ensure that users can add these fields to these listing pages so they can sort/filter and export that data successfully <a href="#">#17342</a>	8/3/2022 17:43
28932	Applying Payment Erroneous Error	" <b>Issue</b> When applying for a payment, an error message is created erroneously, but the payment is successfully applied to the invoice. Additionally, the submit button is not showing as clickable due to a change made for the transaction view "	7/27/2022 16:57
29055	Invoice date & due date issue	<b>Issue</b> :- Login> customer detail page> invoice tab> add new invoice>Invoice date & due date are not saving correctly <b>Expected result</b> :- Invoice date & due date should get save correctly. <b>For example</b> :- 1.During Add ( Invoice date= 14 & Due date= 14) is saved 2. When we click on edit button invoice date=14 & due date= 13 3. When we again set in edit due date= 14, then invoice date= 13 & due date= 12	7/25/2022 10:35
29124	Master customer's invoice (site data) issue	Issue:- Open master customer detail page> click on invoice tab>click on new invoice button> add items & parts, popup open. Select customer, site dropdown data is missing. Expected result:- When we select customer then site regarding to that customer should be shown in site dropdown. 	8/8/2022 14:40
29266	Generate RMR Preview Not Functioning Correctly	<b>Issue</b> When manually processing RMR invoices, users can get to the point where they generate a preview, but the window that shows that the preview is being generated sits at 0% and no invoices ever actually get generated in the preview window at the bottom.	7/30/2022 1:39
29283	Work Order appointments issues	"1. Appointment number that is displayed in the Appointments grid is different from what is shown in appointments tab in Work order details page. 2. Technician name displays only Last name. 3. Site and City Data is not reflected in the grid. Expected : 1. Appointment number should be same at both the places. 2. Technician name should display firstname Lastname 3. Site and City Data should be displayed."	7/29/2022 20:46
29288	Filter issues in Work orders (Open Appointment status)	Filter issues in Work orders (Open Appointment status)	7/22/2022 17:24

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29312	RMR issues	"Save button on RMR edit is always disabled no matter what I enter in all the mandatory/non mandatory fields. In below screenshot i have data in all the mandatory fields . Still the button is not getting enabled. RMR invoice generation history has Refresh button K-highlighted. This should be made just like others."	7/21/2022 12:54
29335	Issue in Add Bill page	When a vendor is selected / changed in Add Bill page, data disappears for sometime. Vendor selection should work fine and page should not reload on changing the vendor.	7/26/2022 17:27
29339	Work Order details page issues	"Work Order status is not displayed anywhere on Work order details page. It should be displayed just like proposal details page. When Voiding Work order , success message is displayed twice. It should be displayed only once. Void button is not expected for New Work orders. Proposal field is always blank. Tax Field is not displayed on WO details page. Tax field does not display the rate. Values are displayed without units Reopen button missing for Voided orders. History pop-up is blank for new work orders. Now Button is missing for Appt time field when its there is sedonaone."	7/27/2022 10:40
29391	Vendor Payments issues	<ol style="list-style-type: none"> <li>1. Bills Drag and drop does not work for Payment applied grid in Payment details screen. Records just disappear.</li> <li>2. Save button is enabled in case of new payment even when no bank account is selected , which is a mandatory field</li> <li>3. Payments are not really sorted on ascending and desc order</li> <li>4. Mandatory fields should be marked mandatory . In this case we cannot create a new payment until a vendor is selected. This should be marked mandatory</li> <li>5. History pop-up is blank</li> <li>6. Distorted bank field when bank name is longer</li> <li>7. Check number column is not displayed in payments grid</li> <li>8. Filters are not working</li> </ol>	8/3/2022 19:42
29394	Voiding Check is not working	<b>Issue</b> When a vendor payment is made using check on check details page we have Void button. If that check is voided using that void button, success message is displayed. But when checked again, void button is still enabled for that check. Void check is not really working.	7/25/2022 9:25
29419	Add RMR Popup UI styles needs adjustments	<ol style="list-style-type: none"> <li>1. Deferred Posting Day label is to close to left textbox.</li> <li>2. Left column drop downs are wider then right, and their size change when selecting options left column dropdowns with longer description.</li> <li>3. The popup's overall height seems too big.</li> <li>4. Popup's Responsiveness is not there for smaller screens.</li> </ol>	7/25/2022 20:41

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29424	Left navigation selection doesn't stay in Customers after refreshing the page while in System Details	n/a	7/25/2022 20:41
29460	Add System popup needs style adjustments	<ol style="list-style-type: none"> <li>1. When selecting drop down option with long description from right form column left side gets squeezed.</li> <li>2. When viewport (browser window) height and width is small, popup is not fully displayed.</li> </ol>	7/25/2022 20:41
29461	System Details View needs style adjustments	System Details View has too much empty space in the main card. We might have to break into 3 or 4 column view and also make sure it's responsive for smaller screen sizes.	7/25/2022 20:42
29553	Can not add item/part to Master Customer Invoice	When adding an item or part to an invoice on a master customer, you must select which sub-customer site. this site dropdown is not working which prevents you from adding any invoices to master customers	7/25/2022 9:18
29554	Customer Branch field	it appear that the customer is supposed to have a branch field on it. we don't have that and that. Need to add branch to both customer details and edit customer	7/27/2022 16:56
29610	Fully Paid Invoice Still Displaying Due Date	<b>Issue</b> When an invoice is fully paid, need to remove the due date functionality on the left card. We no longer need to know how many days until the due date or how many days past the due date the invoice is	9/8/2022 14:22
29613	Remove Leads from eForms	<b>Issue</b> We are still displaying lead information in the shared data fields for eForms. Need to remove the leads area from the shared data form area of the eForms designer altogether. Needs to be removed in the designer from both the left hand menu, as well as when trying to add shared data fields to a text box on the form	8/3/2022 11:57
29629	Lead Shared Data Displaying for Proposal Data Type eForm	<b>Issue</b> When setting up a template to utilize the 'Proposal' data type in eForms, the designer still allows users to add lead shared data to the form. We need to remove this option from the designer, as Managely does not currently have leads. NOTE: We will be adding leads to Managely in Q1 of 2023, so may not want to lose some of this logic if at all possible	7/22/2022 10:20
29630	Cannot Specify Entity for Previewing Integrated Templates in eForms	<b>Issue</b> When previewing templates that are integrated with a specific data type in eForms, users need to be presented with a prompt allowing them to specify what entity they would like to preview that form for. This popup looks as such in AB for a form that is integrated at the proposal level:	7/22/2022 16:52
29641	Check status is not displayed when it is voided	"When a check is voided, we need to display it on the check details page. Currently we do not display it for voided checks."	7/25/2022 14:57
29698	Corrected some issue with Customer Wizard not working	<b>Issue:</b> The customer wizard is not able to save RMR due to the RollUp items being part of the package.	7/20/2022 22:27
29699	Issue with Check Edit button	When a vendor payment is done, check is created. Edit button is enabled for this type of check when in SedonOne we do not allow the user to edit check when it is entered through a payment. In SedonaOne we allow editing for the checks thaaare directly created from vendor check tab only	9/2/2022 9:42

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29700	Documents tab issues	Incorrect message when document is deleted. Replace button does not replace the old document with new one. It deletes the document. Edit documents Pop-up alignment Labels should be right aligned.	8/22/2022 12:32
29701	Issue with Order and shipping date	When a purchase order is resolved and then unresolved ORDER DATE and SHIPPING DATE are changed. Dates should not change	9/1/2022 17:07
29702	Issue with Work Order address in Purchase Orders	When a new Purchase Order is created or an existing is edited , if User selects the Work order, address is also displayed. this address is changed when Work order value is changed. But Address is not removed when work order selection is removed.  <b>Expected</b> : When a Work order selection is removed , WO address should also be removed.	8/11/2022 15:53
29716	Backend Support for Custom Fields 28842	This item contains the needed backend changes for #28842	8/3/2022 17:43
29736	Vendor Payments issues Backend	Vendor payment backend changes.	8/3/2022 19:42
29755	Can't load GL Entry Details	Wasn't able to load GL -> Select GL Entry from the grid to see details. Observe perpetual loading screen.	7/22/2022 16:51
29757	Fixed Scema Error	Minor schema error after merging master	7/22/2022 14:53
29779	Work Order RMR issues	<ul style="list-style-type: none"> <li>Issues in RMR Grid: <ol style="list-style-type: none"> <li>"Next Invoice" column name should be replaced with "Cycle Start" (because value is coming from "RMR Cycle Start Date" when setting it in Add/Edit mode.</li> <li>Description column is shrinking and eventually hidden as window size gets smaller.</li> <li>Activation Date ("Activation") column is missing (it is included in Alarm biller).</li> <li>Cancelation Date column should not be displayed (it is not included in Alarm Biller).</li> </ol> </li> <li>Issues in RMR Details card: <ol style="list-style-type: none"> <li>Field names and their values are not horizontally aligned.</li> </ol> </li> </ul>	7/29/2022 12:15
29780	Issue getting Forte Transaction info for new customers	Issue: When trying to get the Forte checkout data back for a new customer, we get an error saying there is no content in the body. This then causes an error on the frontend saying the response header did not contain the customer_token.	7/25/2022 10:53
29784	Issue with due date in case of "Due on Receipt " term	<b>Expected</b> :> When creating/editing a new invoice, if Term selected is "Due on Receipt" , <b>due date</b> should be set to same as Invoice date. Because in Setup /terms due on receipt is defined as 0 days <b>Actual</b> : Nothing happens when term selected is "Due on Receipt" . Due date does not change automatically.	8/11/2022 15:56
29805	Right Tile is displayed twice when creating Vendor	This right tile is displayed twice in New vendor page.	8/8/2022 13:54

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29832	Stages Bugs	fix following bugs: 1) phone type invalid error 2) error when trying to load primary transmitters 3) branchId being defaulted to 0, update to null instead 4) don't attempt to load integration data if user has not linked site/device	7/29/2022 18:05
29836	GL Entry Branch issues	1. Branches in GL Entry Create/Edit not loaded. 2. After adding a credit or debit entry, selected branch name is not displayed in entries grid.	7/29/2022 16:20
29851	BRANCH error when adding a new site for existing customer	When trying to add a new site to an existing customer , without selecting a branch I am getting errors. Since branch is a non mandatory field, we should allow the user to add site without selecting value in this field.	8/18/2022 10:21
29855	Forte Credit Card adding multiple times	Issue: When adding a forte credit card or e-check, we add the card to the database more than once.	7/29/2022 12:27
29869	Deleting eForms from Proposals	Issue: Unable to delete eForms from the proposal or active forms.	8/1/2022 15:05
29870	Work Order Types not loading	Issue: Work order Types will not load when clicking from setup. Additionally "Add Package" under packages CSS was all wrong and the fields are not formatted	8/1/2022 15:23
29899	Warehouse Parts Error	Issue: Warehouse parts are showing getting a null ref exception when loading.	8/3/2022 10:14
29900	Warehouse missing branch field	In Warehouse setup there is no reference to tie the warehouse to a Branch. This was native to Sedona	8/10/2022 23:54
29919	Tracking History is not functional	<b>Issue</b> The tracking history is not displaying most recent edits made to entities	9/7/2022 17:05
29923	Address Not Accepting Canadian Postal Codes	<b>Issue</b> We need to provide the ability for the zip code field to accept Canadian postal codes. Users can enter them, but need to be able to save the entity with this address. Needs to be resolved for the following entities that allow addresses: <ul style="list-style-type: none"> <li>• Customer</li> <li>• Customer Bill-Tos</li> <li>• Vendors</li> <li>• Company Info area of the setup</li> </ul>	9/8/2022 15:17
29939	Custom Fields Hidden By Default	Custom field columns on all grids should be hidden by default, the user has to select them in the column settings to make them visible.	8/4/2022 16:36
29940	Documents not Downloading after .net6 upgrade	Issue: Since the .net 6 upgrade documents are showing half cut off.	8/4/2022 15:56
29954	Void Check does not free up check number	When creating a payment for a vendor and voiding that payment/check the system does not auto increment the check number and if attempting to make another payment throws an error saying the check number has been used. Does not seem to reverse the journal entry and set the bill amount back to be paid again	8/12/2022 9:40
29958	Create Invoice/Credit	Can not create a new invoice or credit on qaabpro.dynabill.com log in with user: simplx Pass: Test123\$ open the first customer and try to create an invoice	8/30/2022 1:39

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29959	Customer Portal - edit address	log into the customer portal edit the customer details add a line on the Address 2 box hit save it is not being displayed in the UI	8/17/2022 11:16
29960	customer portal - Site Work Order History	log into the customer portal view a closed work order view the site work order history tab	8/19/2022 18:13
29961	Work Order notes column is way to small	n/a	8/9/2022 13:03
29962	Customer Portal New Work Order Save Missing	In the customer portal, I can't save the new Work Order and old notes are automatically showing even without entering them.	8/19/2022 18:13
29963	Dealer Portal does not seem to let you edit site and save	I can't edit and save changes to the site basic info	8/22/2022 18:15
29980	Customer portal should not let you edit documents	All the places to view documents should not let you click on the grid and edit the document. This is under the document tab, proposals, etc.	8/19/2022 18:13
29996	Customer Portal submit payment usability	The submit payment button does work, and you get pop-ups showing it worked. BUT it leaves on you that screen with the button still enabled. It needs to take you back to the Invoice screen.  If you try to pay again, you get the following error.	8/22/2022 18:15
29999	White Space at bottom of UI	Issue: On alpha and in testing, we are now seeing some white space at the bottom of the UI across all of Managely Please let Tom Utley know the root cause when found	8/11/2022 13:53
30000	Chart of Accounts shows blank screen 	Issue: Chart of Accounts no displaying a report	8/15/2022 10:57
30001	System Tab on site not showing System Number	Issue: System Tab on sites should show a clickable system number that can navigate to the system. Similar to Customer/Sites grid	8/24/2022 16:25
30003	Inventory Action Button White Space	Issue: The inventory action column needs to be resized to match the button size	8/24/2022 17:08
30008	Custom Field fixes	During team meeting, the following feedback was gathered on how to improve custom fields: 1) Display better type names in Setup 2) Boolean type columns should display a (disabled) switch instead of true/false Phone numbers should be in Phone format 3) Sometimes after saving a custom field, the value jumps to some other value	8/17/2022 12:27
30011	Custom Field Fixes - Backend	Backend support for #30008	8/17/2022 15:18
30012	Cancel RMR is failing	create a new rmr edit the RMR hit the 'cancel' button confirm it	8/30/2022 9:41
30019	Not able to create Master customer	When a user tries to create a master customer, an exception comes.  <b>Expected:</b> Master customer should get created successfully.	8/12/2022 8:47
30020	Issue with item code /name in cycle distribution report	In RMR Cycle distribution analysis report, instead of item name display the Code of item.	8/11/2022 15:55

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30021	RMR summary report: values alignment issue	Amounts should be right aligned	8/11/2022 15:54
30040	Customer Portal Add Work Order Field Removal	Issue: When creating a work order from the customer portal, some fields should be hidden or defaulted.	8/19/2022 18:13
30161	Error in updating vendors	When updating any of the <b>mandatory fields</b> in vendor edit screen, getting error on hitting save button.	8/26/2022 8:08
30163	Issue in tabs when completing Proposal	When a Proposal status is marked "sold" , Complete tab should open automatically instead of Documents tab.	8/24/2022 17:08
30165	Incorrect message when invoice parts are added	While adding a manual invoice if parts are added , success message says " Invoice <b>items</b> added successfully " Expected : Invoice <b>parts</b> added successfully	8/26/2022 8:51
30185	Payment validating open period of invoice not open period of payment	Set a prior accounting period = open, Set the current period = open Add an invoice where invoice date and due date are within the same prior open accounting period Set the prior accounting period to close From the customer account on the Invoice tab, select the Pay It for the invoice Verify the transaction date of the payment is in the current open accounting period. Provide description and click Submit Payment. Error is received Should the validation of the open accounting period be for the date of the payment transaction and not the invoice?	8/18/2022 18:35
30205	Parts Ledger Not Displaying GL Associated with Part Ledger Entry	<b>Issue</b> Part Ledgers entries are not displaying the GL associated with each entry. Currently it is displaying nothing when viewing the GL tab of a part ledger entry. <b>Resolution</b> Need to ensure that part ledger entries are displaying the associated GL activity that occurred if any. EXAMPLE: If the part ledger entry was created via an invoice, we need to ensure that the GL tab for that part ledger entry includes the GL activity associated with the Parts on the invoice (should be a separate entry that debits Cost of Goods Sold account and credits Warehouse account)	9/7/2022 17:06
30224	Master Customer List Displaying Wrong RMR amount in Total RMR Column	<b>Issue</b> The 'Total RMR' column in the customer listing area is incorrectly displaying the amount and showing all masters as \$(1.00). <b>Resolution</b> Ensure this column calculates the sum of all RMRs that are being invoiced to that particular master	9/7/2022 15:52
30225	Long GL Load times on All Action Alarm	n/a	8/28/2022 11:16
30254	Add Authorities - County Error	when trying to add an Authority to the other/Authorities grid i am getting this error	9/7/2022 17:58
30373	Recurring Reason is not displayed on RMR details page	When creating RMR , Recurring reason field is mandatory. When RMR is created , Recurring reason is not displayed	8/26/2022 8:51
30375	Credit due date issue	Customer details page->Create new credit without changing its credit date and then save. Verify the Due date in DB, due date will be 1 date before credit date.  When user creates credit and change its credit date, then due date is saved correctly in DB i.e. same date as credit date.	9/1/2022 17:07

ID	Title	Description	Closed Date
30377	RMR Rate change total count issue	RMR>Go to RMR listing page>click on "new rate change" button>Select RMR then hit next step button>Enter amount in rate change field. Issue:- When we remove rate change amount wrong new total appear.	9/1/2022 17:06
30389	Reporting Not Accounting for Activity Posted Same Day	<b>Issue</b> When entering information that should be posted to reports on the same day, the report is not displaying that data unless it is run for the day following. I believe this is due to either the entries the report is looking at having a date time that the report is not accounting for, or the report is looking for a date time that the entry is not accounting for. <b>Resolution</b> All reports and entries should not have a date time associated with them and, if posted on a certain date, when running reports for that same date, we should be seeing that data posted on the report as well.	9/7/2022 12:45
30410	Save button issue in RMR Edit	Save button remains disabled even after making changes in RMR edit page. For some RMRs, Save button is enabled after making changes but for others it remains disabled	9/9/2022 1:59
30442	Vendor bill issue	Login>Vendor bill>add new bill>Enter all required fields & add items then save, error comes. Issue:- Unable to save vendor bill. Expected:- It should get saved.	9/1/2022 15:41
30489	Can not add Vendor Checks	The add vendor check is throwing the 'duplicate entry' error for every entry i make	9/7/2022 13:06
30500	Vendor check add issue	Login>Go to vender detail page>add new check>Enter all required fields then click on save button>Exception & error comes. Issue:- Not able to add check. <b>Expected:-</b> Check should get saved successfully.	9/1/2022 15:36
30501	Amount issues in RMR tracking tab	When an RMR item is changed in RMR edit page and hit Save button it loads the details page with updated item and amount. But amount is not updated in Tracking tab. To get the correct amount I need to manually refresh the page. Expected: When RMR changes are saved, Tracking tab data should automatically update and display the latest amount.	9/1/2022 17:06
30513	Cannot Upload PDF to eForm Template	<b>Issue</b> When uploading a PDF to an eForm template, then opening the designer for that template, the PDF backdrop does not display. Will show as a blank background instead of displaying the PDF	9/7/2022 17:28
30515	Template blank after rename	Issue: When renaming a template under edit mode, the template will appear blank in the designer. Expectation: The template should maintain the current design in the designer if data is edited.	9/14/2022 1:09
30596	Sales tax issue in invoice Add/Edit screens	When adding a manual invoice or editing any type of invoice, Sales tax field does not display the sales tax rate % along with tax code.	9/7/2022 13:57
30601	Dates issue throughout the project	<b>Issue 1:</b> When an RMR is edit and Saved multiple times, Activation Date and RMR Cycle start date both are Changed to next date. Say my Activation date is 5th Sep it will become 6th Sep. <b>Issue 2:</b> When I add something for example Notes ,documents . Time displayed is different from my user's time zone (UTC+5:30 ,which is similar to my machine time). Time is always displayed in UTC. This issue is throughout the project.	9/12/2022 8:25

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30603	Extra Entry issue	<p>Make any RMR and make sure the next invoice date is the 1st of the current month.  Generate preview-&gt;process invoices-&gt;View the new invoice-&gt;Items tab-&gt;  One entry will be of a pro-rated amount(which is correct) and one will be with the full monthly amount(Which is wrong).</p> <p>Expected:--Only one entry should take place i.e of pro rated amount.</p>	9/8/2022 17:47
30608	Issue in Print Checks	<p>Login to Managely  Go to Account Payable  Open Print Checks</p>	9/8/2022 17:45
30609	Vendor Payments listing - Check number hpyerlink issue	<p>Check number hyperlink navigates the user to Payment details page instead of check details page.  Login to Managely Go to Account Payable Open Payments Click on check number hyperlink</p>	9/12/2022 13:21
30645	Error when clicking "Log into Dealer" from the new host portal	n/a	9/7/2022 12:44
30649	Site field retains values in Add WO and Add Proposal pop-ups	<p>Login to Managely  Go to Wo list  Add a new WO  Select a customer and site in the pop-up  Change the customer in pop-up  Verify the site  <b>Expected:</b> Site should be removed when customer is changed in the pop-up</p>	9/8/2022 17:49
30671	State value not getting saved.	<p>Add/Edit customer page-&gt;State dropdown-&gt;Select any value-&gt;Save.  Edit customer-&gt;Observe the state value.  State value is not getting save.</p>	9/8/2022 14:38
30681	Vendor Payments listing - Check number hyperlink issue - Backend	n/a	9/12/2022 13:21