



Managely Release Notes

October 2023

Version 5.3.29.12

MANAGELY™

Contents

Application Corrections.....	2
Customer Portal Issue (labels missing on form)	2
RMR Discrepancy between fields in Managely.....	2
Do not have rights to access Accounting Periods	2
Cannot see technician names on the calendar week or month view	2
In customer portal, customers can adjust/remove the late fee on their invoice	2
Managely allows users to save a site without a zip code (breaking the customer’s account)	2
Part Kit Issues.....	2
If you have an open payment on the customer’s account and the customer is setup for auto pay, you get an error when processing cycle invoicing.....	2
Eform Error when Adding credit cards.....	3
Formatting Errors with Work Orders	3
Billing Tab Info Not Transferring to Invoice	3
System is not deleting invoices Parent case -86466.....	3
Auto Payment Date Wrong	3

Application Corrections

Note: These release notes include fixes in Managely versions 5.3.29.6, 5.3.29.8, 5.3.29.9, and 5.3.29.11.

Customer Portal Issue (labels missing on form)

We added fields that were missing from the form.

RMR Discrepancy between fields in Managely

We removed the Total RMR and total balance from the grid as they are already shown.

Do not have rights to access Accounting Periods

We fixed an issue where users did not have the rights to access accounting periods.

Cannot see technician names on the calendar week or month view

We added the technician names to the tooltip on the calendar week and month view.

In customer portal, customers can adjust/remove the late fee on their invoice

On the customer portal, we made late fees read-only so that they cannot be changed.

Managely allows users to save a site without a zip code (breaking the customer's account)

We fixed an issue where users could save a site without a zip code, which was causing issues on the customer's account.

Part Kit Issues

The invoice break down of the parts within the kit showed the cost and not the rate of the parts. We changed this so the parts of the kit show using the breakdown of the rate. The program does a calculation to determine what percent the part represents in the Rate defined for the part kit.

If you have an open payment on the customer's account and the customer is setup for auto pay, you get an error when processing cycle invoicing.

System Defaults (Setup > Company > System Defaults) has a setting called "Auto Apply Payments/Credits". If this is set to Yes, when a recurring invoice is generated any unapplied payment for the customer will be applied to the invoice. If this switch is set to Yes and a customer is set up with a Payment Method (credit card) that is set to Auto Recurring = YES, when a recurring invoice was processed, the program was trying to apply the unapplied cash and charge the credit card causing an error.

We resolved this by processing the unapplied payment first and then if there is a remaining balance by charging the credit card for the balance. If the unapplied cash is sufficient to cover the recurring invoice, then no credit card transaction will be processed.

Eform Error when Adding credit cards

We resolved this error by including the Dealer ID with the user authentication when adding credit cards.

Formatting Errors with Work Orders

We corrected issues so the work order template can do the formatting as expected.

Billing Tab Info Not Transferring to Invoice

To resolve this, we made changes to display the system default memo only for new invoices, not while editing them.

System is not deleting invoices Parent case -86466

Inactive records are now excluded from the invoice grid.

Auto Payment Date Wrong

To resolve this, we updated the invoice date to be the due date.