Managely Release Notes

January 2024

Version 5.3.33
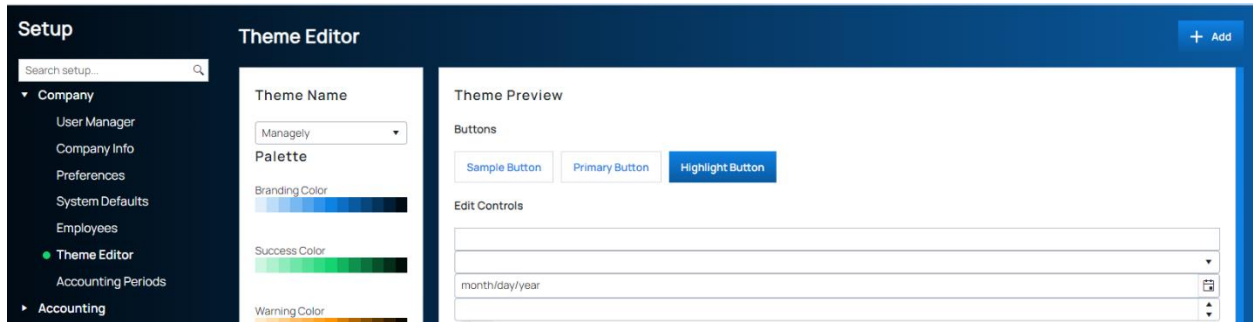
MANAGELY™

Contents

Enhancements

Theme Editor Enhancement: Save custom themes to database

The Theme editor (Setup > Company > Theme Editor) now supports add, edit, and Delete functionality and will save custom themes to the database:

There are two built-in themes: Managely and Managely Dark. These cannot be edited or deleted. The Managely theme is used as the default if a user's custom theme is deleted.

Users click the **Add** button to create custom themes, specifying a theme name (must be unique) as well as various color selections across the pages in Managely.

For example, this is a custom theme with a different branding color, dark mode, and white text color:
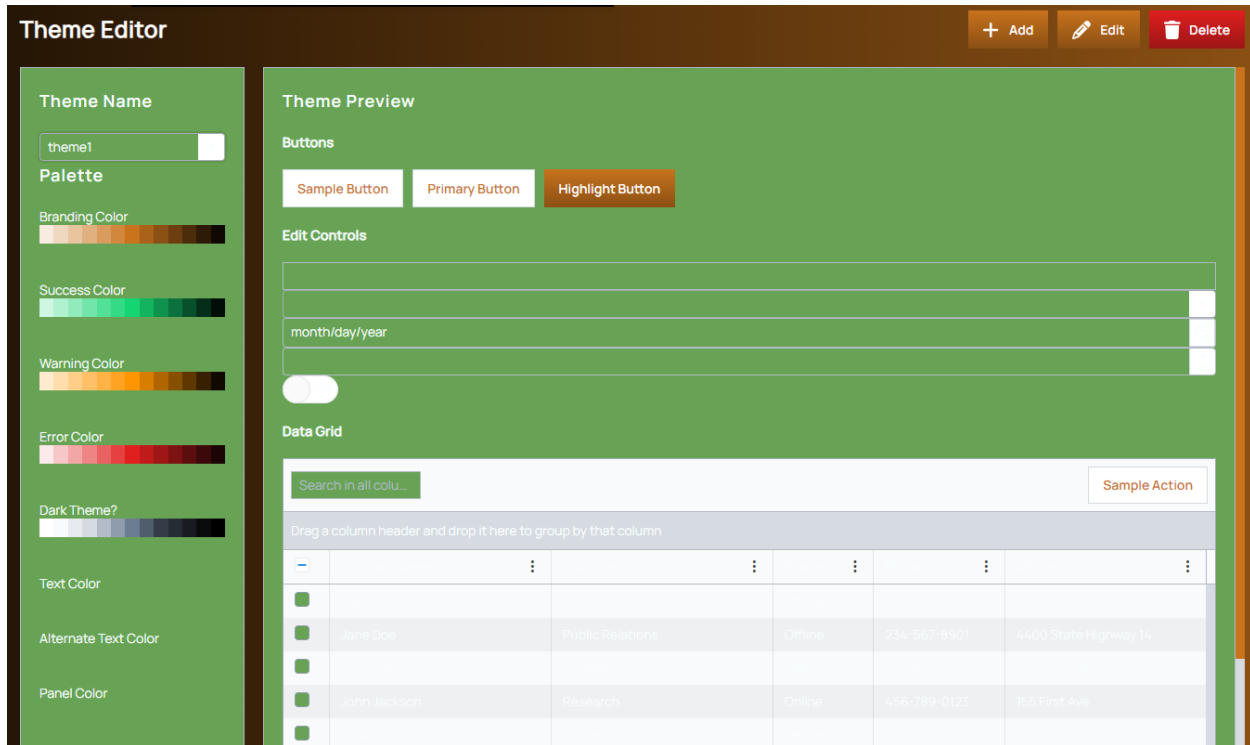
When a custom theme is deleted, a warning message is displayed that resets any user using that theme back to the default Managely theme:
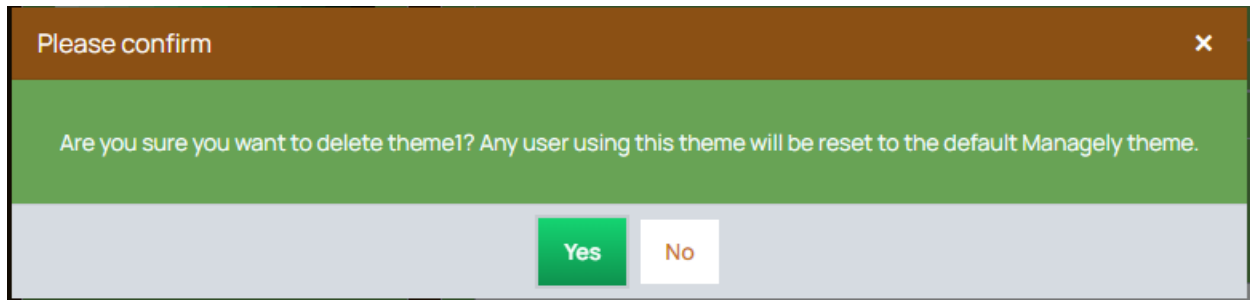
Implemented part kits for proposal charges tab

For proposals, the Charges tab now includes part kits. As part kits are added to the proposal, they are also added to the Charges tab.

Application Corrections

Physical inventory tab is not visible in a warehouse when logged in as host [87339]

We added Physical Inventory to the HostToDealer list of roles. Also, on the page, we added a check so that if a user has the hostlogintodealer role, it will show the physical inventory.

Unable to view parts on dealers accounts from host [00087303]

We fixed an issue with accessing dealer's accounts that was not displaying the parts tab within work orders.

Unable to get branding color to stay [78339]

We resolved this with the enhancement for the theme editor and saving custom themes.

Support is missing tabs and access in Managely [96041]

We added access for the missing tabs for Managely Support to help with the customer resolution of cases.

SedonaX still showing RMR when that permission is set to off [95389]

We added a check for RMR view permission to prevent technicians from viewing RMR if they do not have the permissions set to do so.

MG 5.3.31.28 system locks the access to viewing customer invoices after generating a preview of recurring invoices [99505]

When logging in as a customer user (into the customer portal); logging out; and then logging back in as a dealer (admin) user; and then navigating to any customer detail page, the invoice grid would give an error. This was caused by a setting not being reset after logging out of the customer portal, so the system acted as though the dealer user was still in the customer portal, which caused an error. We fixed this by changing the setting to false when not in the customer portal.

Managely issues with technician's schedules and work orders [99009]

We fixed an issue with schedules that were not showing a technician's work orders if the technician was not the lead technician.

Manual GL entries in Managely post as of the date prior to the date you actually entered [96137]

We corrected an issue with manual GL entries so that they post as expected (not the date prior).

RMR Audit Tracking Report is blank [99321]

We changed the filter on the RMR Audit Report so that the report is no longer blank.

Memo on PO [89380]

We changed purchase orders so that memos are visible to users in view mode.

RMR doesn't show properly [98368]

We fixed RMR total display on the customer details page; the RMR total updates after adding new RMR. This affects the customer details page; site details page; and system details page.