Managely Release Notes

March 2025

Version 5.3.46.7

Contents

Enhancements

CRM

CRM Dropdown Sorting and Item Code Addition

The contents of dropdowns are now sorted alphabetically with any numeric values listed first to help users find and select options more efficiently. Item codes are displayed alongside item names in item-related dropdowns to allow for better identification, reducing confusion and errors.

These are the affected modules:

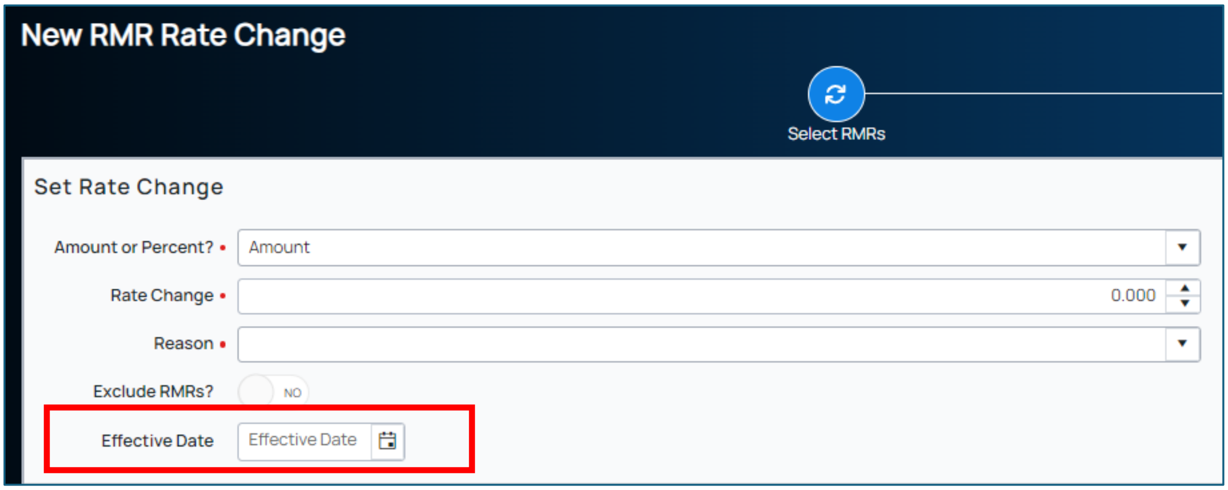
- Customer Wizard
- Customer Edit
- Site
- System
- Lead
- Contract
- Proposal

Accounts Receivable

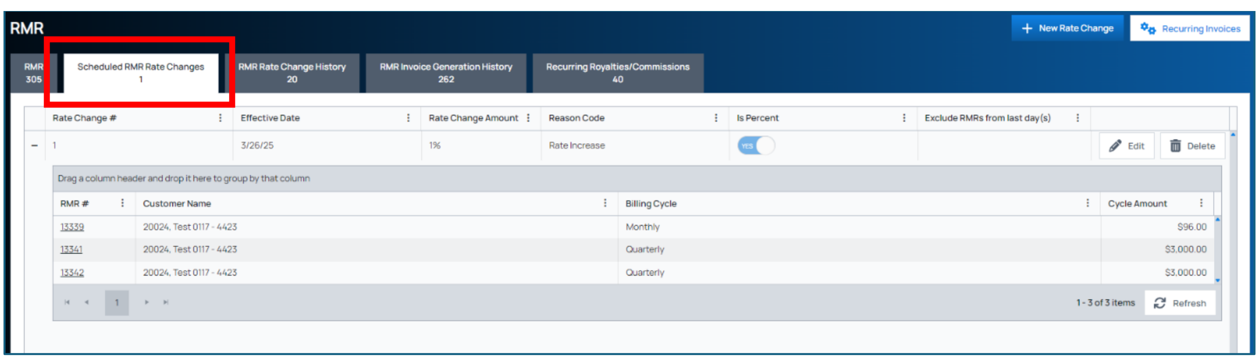
RMR Rate Change [97282]

Users can specify an effective date for a rate change so that they can set up these rate changes in bulk in advance of the change date. This is to save time and the risk of making a rate change effective before the desired date.

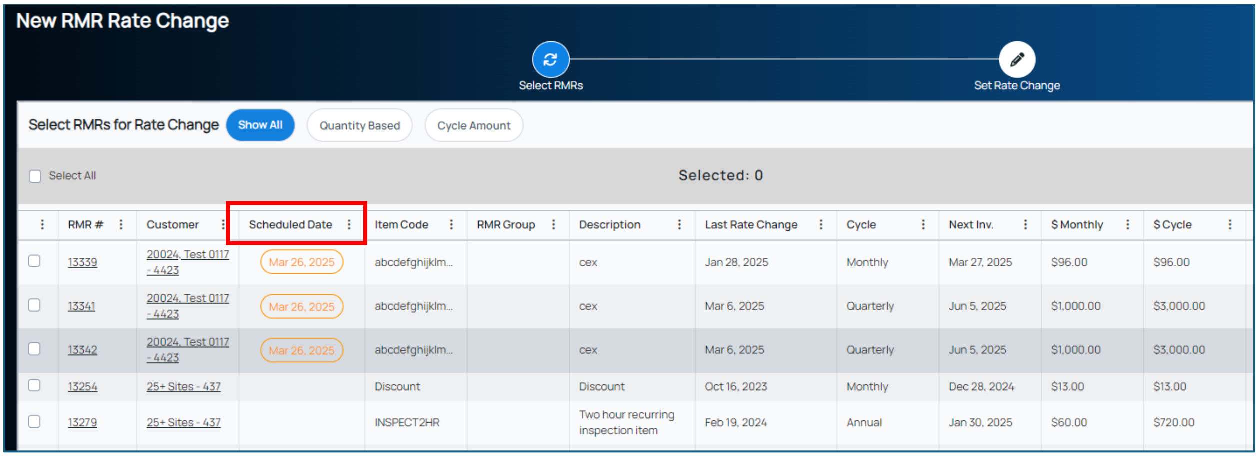
When creating a new RMR Rate Change, there is now the option to select an **Effective Date**, which will schedule the rate change to be applied on that date:



There is also a new tab called Scheduled RMR Rate Changes (Accounts Receivable > RMR) that shows all scheduled rate changes. Users can edit or delete the rate changes before they are applied on their effective date. Users can expand the rate changes to show all associated RMRs that will be affected by the change:



The grid to select RMRs for rate change now has a column called Scheduled Date that indicates any scheduled rate changes for that RMR. An RMR can have only one scheduled rate change at a time. Attempting to schedule another one will display a warning message:



RMR #	Customer	Scheduled Date	Item Code	RMR Group	Description	Last Rate Change	Cycle	Next Inv.	$ Monthly	$ Cycle
13339	20024, Test 0117 - 4423	Mar 26, 2025	abcdefghijklm...		cex	Jan 28, 2025	Monthly	Mar 27, 2025	$96.00	$96.00
13341	20024, Test 0117 - 4423	Mar 26, 2025	abcdefghijklm...		cex	Mar 6, 2025	Quarterly	Jun 5, 2025	$1,000.00	$3,000.00
13342	20024, Test 0117 - 4423	Mar 26, 2025	abcdefghijklm...		cex	Mar 6, 2025	Quarterly	Jun 5, 2025	$1,000.00	$3,000.00
13254	25+ Sites - 437		Discount		Discount	Oct 16, 2023	Monthly	Dec 28, 2024	$13.00	$13.00
13279	25+ Sites - 437		INSPECT2HR		Two hour recurring inspection item	Feb 19, 2024	Annual	Jan 30, 2025	$60.00	$720.00

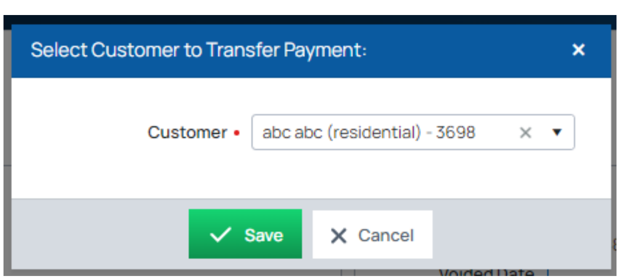
Users can apply a rate change immediately by leaving the Effective Date blank on an RMR that has one scheduled.

Transferring Existing Unapplied Cash to Another Customer [121955]

Users can now transfer an existing payment from one customer to a different customer. This helps in situations where a payment was entered for the wrong customer by mistake or if a payment was entered for a master customer and later needs to be transferred to a child customer.

On the payment details page (Accounts Receivable > Payments > Deposits > Batch # hyperlink > # hyperlink), there is a **Transfer** button:

Click this button to choose another customer to transfer the payment:



Note: Only payments with $0.00 applied amount can be transferred. If there is an applied amount, un-apply it before transferring.

Removed Filtering and Sorting Options for Custom Fields Columns in List Grids

For customers, sites, systems, work orders, proposals, and RMR using custom fields, we removed the filtering and sorting options for these columns if users add these columns to grids. Filtering and sorting the custom fields options was causing an error.

Percentage Being Billed for Displayed Items and Parts in Progress Invoicing

Customers receiving progress invoices (Accounts Receivable > Invoices) will now see a percentage being billed for each item and part on the invoices. This helps them see what portion of each item or part is being billed compared to the total amount.

A new column labeled "Percentage Being Billed" was added to the invoice printout. This column appears only when progress invoicing is applied. The column is placed next to the Quantity and Rate columns for clear readability. Qty (quantity) and Rate show as the full amount and the total reflects the percentage being billed.

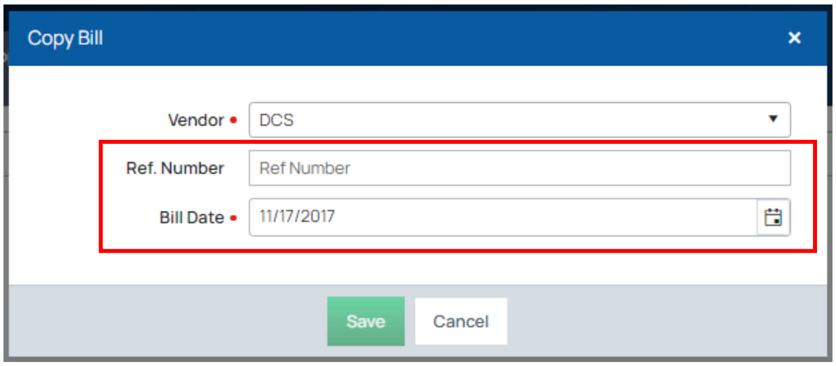
Description	QTY	Rate	Percentage Being Billed	Amount
Bucky Barns, 8401 Chagrin Rd, OH				
Service Fee	1.00	¤50.00	1.8671 %	¤0.93

To see this column, be sure the template used for the invoice has the Percentage Being Billed added.

Accounts Payable

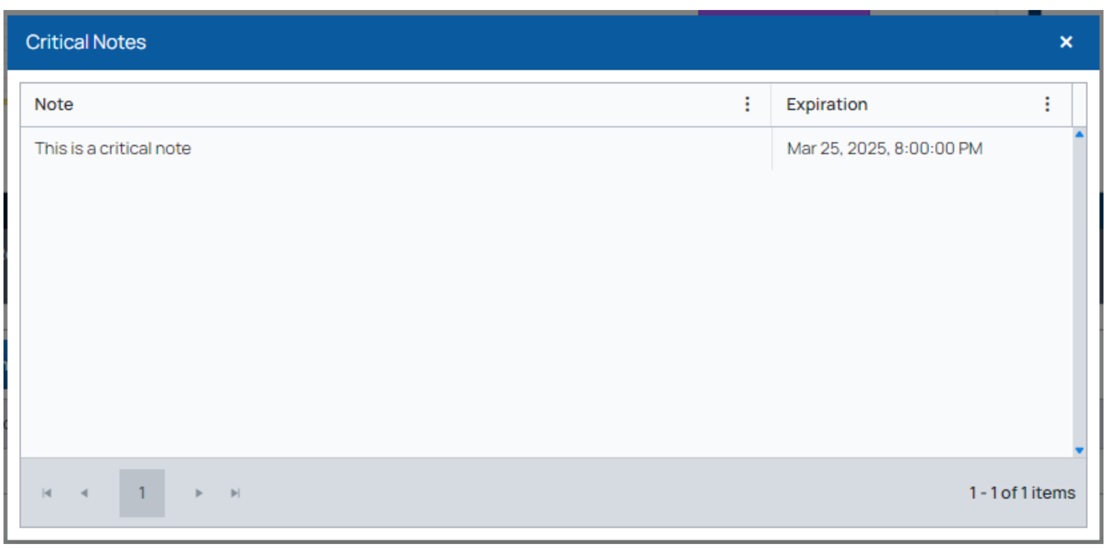
Support Copying Bill To Originating Vendor

When users copy a bill (Accounts Payable > Bills > Reference Number hyperlink > More button > Copy) to the same vendor, they can change the date and reference number of the bill. This is to help users save time copying recurring bills each month. On the Copy Bill popup, there are two new fields: Ref Number and Bill Date:



Critical Notes Appear on Vendor Detail Page

If vendors have critical notes added, these will appear on the vendor detail page (Accounts Payable > Vendors > Vendor # hyperlink).



To close the note, click the X in the top right corner of the Critical Notes window.

To add critical notes, open a vendor detail page.

Click the Notes tab and click the **Add Note** button.

Type the note and choose Critical in the **Type** field. Only critical notes appear when users open the vendor detail page.

Choose an **Access Level** and type an **Expiration Date**, if needed. Save the note.

GL

GL Dropdown Sorting and Item Code Addition

The contents of dropdowns are now sorted alphabetically with any numeric values listed first to help users find and select options more efficiently. Item codes are displayed alongside item names in item-related dropdowns to allow for better identification, reducing confusion and errors.

These are the affected modules:

- General Journal Entry
- Bank Accounts
- Branches
- Add GL Account
- Add Credit Card

Application Corrections

Customer name field not showing capitals [115788]

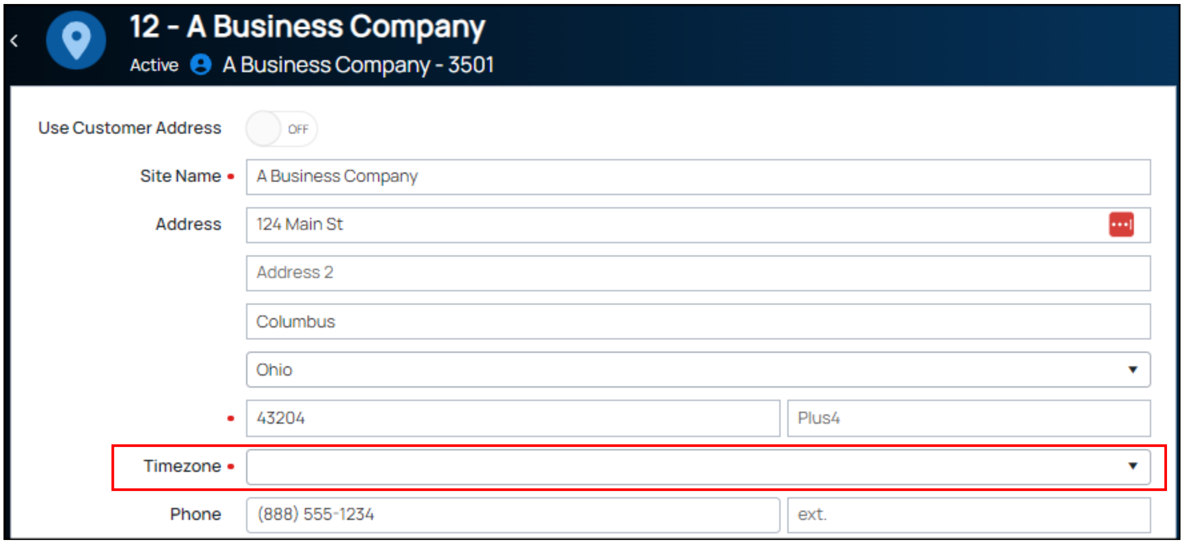
We corrected an issue of the customer names not showing in capitals as typed.

Calendar showing incorrect appointment number and displays appointment in UTC instead of CST [121030]

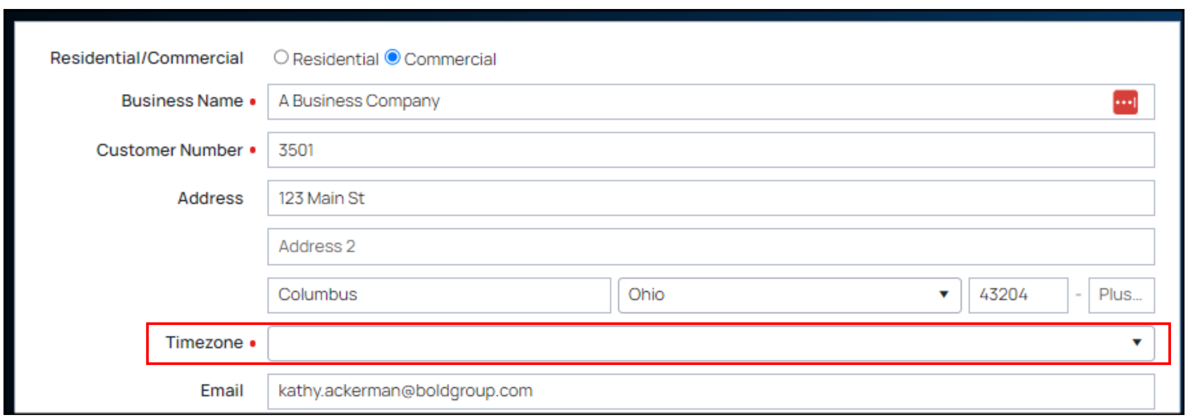
Appointment reminders that were emailed to customers displayed the incorrect appointment number and the time was in UTC instead of the end-users time zone.

We added a Time Zone field to all Site add/update forms, as well as all Customer add/update pages that will be required fields moving forward. Once a time zone is defined for a site or a customer, it will be correctly reflected in the email (The logic will first try to use the customer portal user’s time zone, then the site’s time zone, and lastly the customer’s time zone). If no time zone is defined for any of these, the server’s time zone will be used as fallback.

Customer site page:



Customer page:



For the time zones to reflect the customer's time zone, the customer's time zone must be set, either on a customer user, the customer, or the site for the appointment. It is important to actively make that change in Managely.

Appointment confirmations (from emails) now work when customers are not signed in.

When All Day is selected in the appointment, the appointment details now include the start date as well as the end date. This is also true for appointments that are not set to All Day but start and end on different days.

The appointment time range only showed the default 120 minutes for customers when the All Day option was selected, and the All Day text was left out of the appointment details in the email. These are now fixed.

When adding parts to work order, I cannot see the “Name” column of the part [121120]

We fixed the width of the grid for the part picker. This resolves the issue of the Name column disappearing when the screen is small from shrinking the view in the browser.

Can’t bill progress invoice [121930]

Users were getting an error when creating a 10% invoice after the 50% on the work order was already paid.

We fixed the error users received when creating another progress invoice after half on the work order was paid.

Invoices based on percentage - display of contents in invoice

We made changes to the default invoice template based on the following points:

- Added a Percentage Being Billed column in the Charges grid
- Displayed the actual rate of part/item/part kit under the Rate column in the Charges grid
- Updated the amount based on the progress invoice percentage
- Show/hide the Percentage Being Billed column based on the progress invoice or other invoices

Appointment confirmations emails are being sent to the clients with the wrong time [124435]

Confirmation emails were displayed in UTC time instead of the customer’s time zone.

We resolved this issue so confirmation emails are displayed in the customer’s time zone.

Turning off the options for delivery method of mail creates a data issue [123393]

On Setup > Company > Preferences > Site Settings tab, users could turn off the option for **Disable Mail Service** (the Sebis option) without making any changes to customers already on that delivery method creating data issues.

We added a dialog to the action of disabling the Mail Delivery Service. The dialog lists the implications of this action, which changes the delivery method of all customers who have Mail selected as the delivery method to Print. We also added a help tip next to the switch to inform users before changing the switch.

Deposits within the overview of a proposal are displaying the item description and need to display the item code [128180]

The dropdown lists for the proposal items now show the item code and description.

If you forget to enter the reference number you cannot go back and add it after the bill is saved [128544]

We changed this so that users can edit the **Ref. Number** (reference number) field.

Autopay date on invoice incorrect [128817]

Auto pay invoices were set to auto pay on the 1st day of every month, but on the customers' invoices under Do Not Pay it stated it was going to come out on the 16th day of the month which was incorrect.

We fixed this to use the auto pay's date.

The time zone is off by 8 hrs [129031]

We fixed the time zone shown in appointments.

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 now displays the same way it is typed in the textbox.

Can't sort by site number [129295]

We changed the sorting to sort by number where possible and then by anything else (for example, alphabetically).

Customer portal default work order type and default work order status do not default [129441]

We corrected this, so in the customer portal, during new work order creation, if the user is a customer, then work order defaults come from the Settings > Company > System Defaults page, **Customer Portal Work Order Type** field and **Customer Portal Work Order Status** field.

Filters in the grid of the collections queue do not work correctly and throw errors [129446]

The filters in the Collections Queue grid did not work correctly and caused errors.

We fixed the errors in the filters for the collections queue grid.

Customer and technician notifications have the “when” time off by 6 hours [00129620, 130421]

We resolved the issue of customer and technician notification times being off by six hours.

Work order notes do not allow for a carriage return [130596]

We changed all notes throughout Managely (not just on work order notes) to support line breaks (also called hard returns or carriage returns).

Invoices are missing the description following the carriage return when migrated from AlarmBiller to Managely [130595]

Invoices that were created in AlarmBiller and moved to Managely during a conversion were missing all the information that followed the carriage return. The information was available when clicking into the invoice within Managely but did not display on the invoice.

We adjusted the template to show the additional lines.

We have added .01 NON-taxable and yet it added .02 to my total [00130599]

We fixed the calculation issue.

Work order number too close to border {131124]

The work order number could not be moved any further from the border, and the Delivery Date did not align correctly.

Users can now enter space in the text editor to move the work order number and it will reflect in the printed PDF file. Also, we updated the default template for purchase orders to include a space to move the delivery date from the border.

Red font is not appearing when editing a static text box [00131551]

Templates & Forms > Templates > Templates tab > Design button > Tools > Add Text box > Edit text > font -- missing the color red.

We changed the controls for the font color so that users can choose by gradient instead of by pallet.

Issue when an invoice is IMPORTED into Managely [130125]

Users were unable to import invoice terms in invoice uploader, causing invoices to import with the correct due date, but incorrect terms.

We fixed this issue to use the customer’s default terms.

AlarmBiller parity: when generating a lead primary salesperson and secondary salesperson do not get email notification [132410]

We implemented changes to trigger email notifications for the Lead Primary Salesperson and Secondary Salesperson.