Managely Release Notes

April 2025

Version 5.3.46.10

Contents

Enhancements

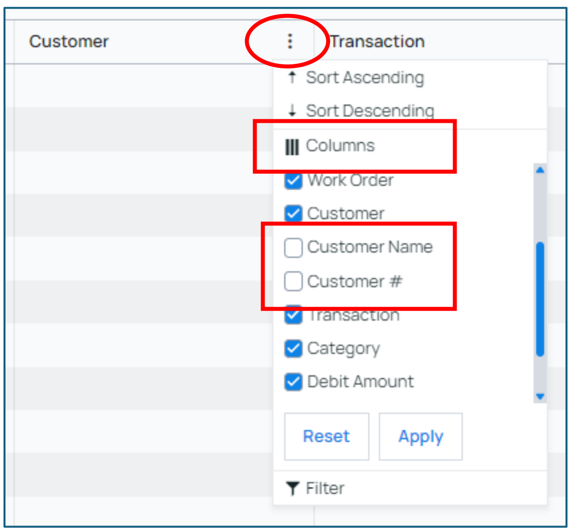
GL

GL Grid Column Changes

We added the Customer Name and Customer # columns to the G/L account page. These columns are hidden by default. Users can show these columns:

Open the GL account page (GL > GL Register > Account Number hyperlink)

Click the three dots beside any column name.



Click **Columns**.

Select the checkboxes for **Customer Name** and **Customer #** (if needed).

Click **Apply**. The menu closes and the grid shows the Customer Name column and Customer # columns.

In addition, we made these changes:

- We added the Customer and Transaction columns. These are visible by default. The Transaction column is a hyperlink to the entry details.
- The Debit Amount, Credit Amount, and Balance columns are fixed to the right side of the grid. These are always displayed. The other columns are scrollable from left to right.

System-wide

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.

Application Corrections

Customer payment total - late fee [00119826]

We fixed an issue so the late fee shows in the invoice total.

Allow for letters in the phone number extension field [00130597]

We removed the restriction to only allow numbers in the contact phone extensions.

Inconsistencies with formatting: customer wants $ on both parts and RMR [00131137]

We added the $ symbol to the Monthly Recurring Fees on invoices.

Vendor address (city state zip) are not pulling into template [131123]

When selecting to add the vendor address to a template, the street address pulled but the city, state, and zip did not pull in.

We added the vendor city, state, and zip code to the "To" section of the Default Purchase Order Template.

Naming convention is wrong on eForms: vendor # & customer # [131122]

The Vendor # was not in the shared data as an option to add. Customer # was the only option. When selecting customer number, the vendor number displayed in words. However, the eForm pulled in the customer number under the vendor.

The Vendor # field on purchase order forms now correctly uses the Vendor Number.

Fonts and boxes are not lining up on default proposal [00130724]

We fixed the alignment issue of text in the template engine and updated the default template to fix other formatting issues.

Customer should not have the ability to remove late fees in customer portal [131738]

We removed the On Account switch and disabled the Late Fee textbox when payments are accessed via the customer portal.

Breaks disappear if you edit them [131866]

We fixed the issue of appointment breaks of previous appointments being deleted when a new appointment was added.

Part Kit not showing item part code on invoice – it's blank [00131914]

We fixed this issue so that part kit codes appear on invoices.

Copy proposal, the proposal is showing one customer, but when clicking on the proposal showing the original customer you created the copy from [132422]

After copying a proposal, clicking on the proposal showed the original customer the proposal was copied from. We fixed this issue.

Batch payment failure [00132969]

We addressed a situation where the **Apply** button would remain busy if an error was returned from the server. In this case, a user had paid the late fee twice for a customer, causing an error. The user believed the system was still processing the task because the button remained busy. Refreshing the page was required to reset the button, and if the user had not saved their progress, they would lose their work.