Managely Release Notes

May 2025

Version 5.3.46.16

Contents

Enhancements

Accounts Receivable > Work Orders

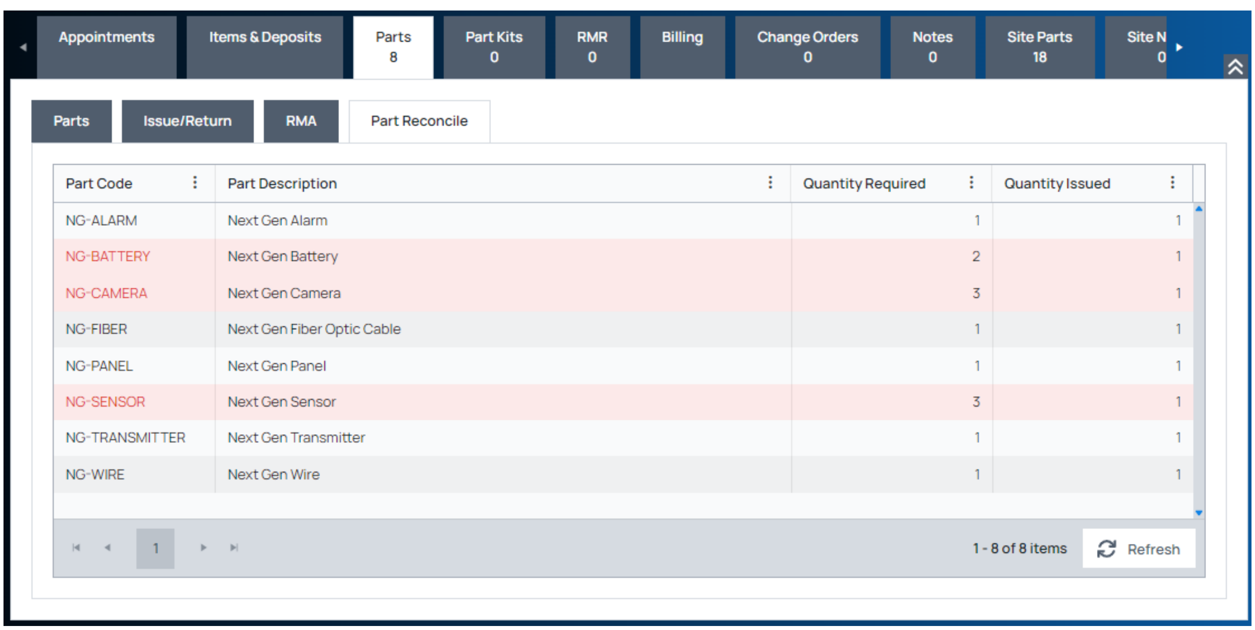
Work Order Parts Reconcile (Pro Feature)

We added the Part Reconcile tab and grid to the Parts tab on work order details for the Managely Pro license level. (Accounts Receivable > Work Orders > work order number > Parts tab > Part Reconcile tab)

The tab loads a grid that shows parts with total quantity required and issued information.

- Part Code: this is a unique value, meaning there will no more than one record with the same part code.
- Part Description: this is the part description from the setup.
- Quantity Required: the sum of quantity required for all work order parts that share the same part code.
- Quantity Issued: the sum of quantity issued for all work order parts that share the same part code.

Rows that are shaded light red and part codes shown in red indicate what is not reconciled (quantity required not equal to quantity issued).



Part Code	Part Description	Quantity Required	Quantity Issued
NG-ALARM	Next Gen Alarm	1	1
NG-BATTERY	Next Gen Battery	2	1
NG-CAMERA	Next Gen Camera	3	1
NG-FIBER	Next Gen Fiber Optic Cable	1	1
NG-PANEL	Next Gen Panel	1	1
NG-SENSOR	Next Gen Sensor	3	1
NG-TRANSMITTER	Next Gen Transmitter	1	1
NG-WIRE	Next Gen Wire	1	1

Closed Work Order Column Choices [133185]

We added custom column functionality in the closed work order grid. (Accounts Receivable > Work Orders > Closed Work Orders tab)

This allows users to add columns for custom fields to the grid.

Accounts Payable

Accounts Payable Dropdown Sorting and Item Code Addition

Within the Accounts Payable module, all dropdowns will now have sorting functionality to help users find and select options more efficiently. Item codes will be displayed alongside item names in item-related dropdowns to allow for better identification, reducing confusion and errors. Affected dropdowns are in these:

- Purchase Orders
- Suggested Purchase Orders
- Vendor
- Vendor Receipt
- Vendor Bill
- Vendor Credit
- Vendor Payment
- Vendor Recurring Bills
- Warehouse
- Part Transfer
- Parts

GL > Chart of Accounts

Added Ability to Delete GL Accounts with the Type Inter-Branch

Interbranch accounts can now be deleted from the Chart of Accounts (GL > Chart of Accounts) IF there are no associated entries with that account and no branch is associated with it (meaning the branch was deleted or the account was created as a standalone).

To quickly find interbranch accounts, open the Chart of Accounts (GL > Chart of Accounts).

In the grid, click the Account Type heading to sort accounts by account type.

Use the grid navigation buttons to advance pages to find the interbranch (Inter-Branch) accounts.

46846464	Inter-Branch	User Story 49799: Ability To Delete GL Accounts Wi	Edit	Delete
19503	Inter-Branch	Inter-Branch Due To Test1	Edit	Delete
19502	Inter-Branch	Inter-Branch Due From Test1	Edit	Delete
19501	Inter-Branch	Inter-Branch Due To QAA	Edit	Delete
19500	Inter-Branch	Inter-Branch Due From QAA	Edit	Delete
19477	Inter-Branch	Inter-Branch Due To DFLT2	Edit	Delete
19476	Inter-Branch	Inter-Branch Due From DFLT2	Edit	Delete
19475	Inter-Branch	Inter-Branch Due To DFLT1	Edit	Delete
19474	Inter-Branch	Inter-Branch Due From DFLT1	Edit	Delete

1 2 3 — 101 - 200 of 272 items — Refresh

At the far right of each row, click the **Delete** button to remove unnecessary accounts.

Time & Attendance

Responsive Clocking In and Clocking Out Screen for Mobile Devices in Managely

We created responsive pages for clocking in and clocking out. This means that users will be able to clock in and out on mobile devices of various sizes and the screen will automatically adjust to the size of the device's screen.

Avalara Integration

Increased Avalara Logging

We added a new logging service specifically for logging external service calls. This can easily be added to a new service by giving the client the interface IExternalClient. If it is registered using .AddProxied, it will automatically be wrapped by a logger that handles logging all the calls made by this service to the aExternalLog table.

The ExternalLog service has two methods: one to add new logs and another to read the logs. The service uses the data context directly so that saving with it does not result in committing any existing tracked entities.

The External Log Query only gets the current logs. It is pageable, sortable, and filterable with the default order is descending by created date.

We used the DateTimeOffset for the date so time zones are not an issue.

Application Corrections

Time stamp [00110477]

When data was exported to Excel, the date did not always match with the date displayed for the data in Managely.

We changed the payment deposits grid so that the payment date in exported Excel data is the same as in the grid.

eForms going blank after switching pages [118054]

When completing an eForm document, going to the next document in the eForm, and then returning to the original, the background would disappear. We corrected this issue.

Voided change orders are included in billing amount [122366]

Voided change orders were able to be invoiced.

Voided change orders are now filtered out from selectable options. As a result, users cannot void change orders anymore and deleted change orders will not affect any financials.

Work order financials not reflecting change order edits [123330]

Initial edits to change orders did not apply, users had to edit them a second time for the updates to apply. This issue is no longer reproduceable.

Changes for deleting a direct expense receipt with a part linked to a work order [00125836]

Deleting a direct expense receipt did not remove the receipt issued quantity from the work order.

We implemented these changes for deleting a direct expense receipt with a part linked to a work order:

1. When deleting a direct expense receipt with a part linked to a work order:
    a. Managely adjusts the related work order part's Quantity Issued (Quantity Issued = original Quantity Issued – Receipt Part Qty).
    b. Managely deletes the related parts issue record from Issue/Returns for a work order along with the Part Ledger entry for that Issue.
2. When deleting an individual part from a direct expense receipt for multiple parts:
    a. Managely adjusts the related work order part's Quantity Issued (Quantity Issued = original Quantity Issued – Receipt Part Qty).
    b. Managely adjusts the related issue record for a work order and Part Ledger entry for that issue:

   i. Removes issued parts related to the deleted receipt parts from the Issue.
   ii. Removes the Part Ledger entry details related to deleted issued parts in step i above.
3. If a direct expense receipt was created without a purchase order involved (Accounts Payable > Bills > Receipts tab > New Receipt button), deleting individual parts linked to a work order from that receipt or deleting the receipt itself that has part(s) linked to a work order should trigger:
   a. Re-generation of a part ledger entry if a part ledger entry to reserve a part from a warehouse to a linked work order does not exist.
   b. Re-calculation of a quantity reserved if a part ledger entry to reserve a part from a warehouse to a linked work order already exists.

   A reserved part ledger entry is generated when a work order is saved with a part that has a stock flag turned on. Users can find it in Accounts Receivable > Work Order > Work Order Detail > Part Ledger tab. This indicates how many are committed to being pulled from the associated warehouse.

   The quantity committed from warehouse changes as soon as the work order part gets issued.

4. When a user deletes a direct expense receipt that has part(s) on a work order Managely shows the following message "Work Order Parts created for this receipt will remain. Are you sure you want to delete this receipt?"
5. If a direct expense receipt that has part(s) on a work order is converted to a bill and a user tries to delete that bill, Managely shows the following message: "Work Order Parts created for this bill will remain. Are you sure you want to delete this bill?"
6. When a user deletes an existing direct expense receipt part that is on a work order, Managely shows the following message: "Work Order Part created for this receipt part will remain. Are you sure you want to delete {part.description}?"

Sales packages do not populate parts and items in manual invoices [00129442]

The Invoice page did not support loading and populating the items and parts from a sales package.

We changed this so now the page will automatically populate the Items tab and Parts tab when a user selects a Sales Package. It will also remove them if the Sales Package is cleared or replace them when a different sales package is chosen. Sales Packages can be configured under Setup > Proposals > Packages.

eForm template discarded changes made yesterday [00131069]

A user changed an eForm, but the changes did not save as expected. We fixed this issue.

RMR number is not displaying the number of RMRs (displays zero) unless the tab is clicked on [00131338]

The customer RMR number did not display the number of RMRs (displayed zero) unless the tab was clicked on. This was also an issue for the Service History tab.

We fixed this to display dynamic counts for the Service History tab and Customer RMRs tab under the master customer section to enhance data visibility. This provides users with a quick overview of related records without opening each tab.

Questions about a customer [00130778]

RMRs for master customers displayed the wrong date in the next cycle date, making it confusing for the dealers. After clicking on the RMR, or going into the edit mode, the date was correct.

For the next cycle date and cancellation date, we added UTC to ensure the date is displayed in Coordinated Universal Time rather than the local time zone.

Saved changes are not always saving [00131405, 131684]

Users made changes to templates and saved the changes; however, changes were not always being saved. This issue is now fixed.

In addition, we fixed these other issues:

1. Image background color was not loading the current background color in the color picker after saving and refreshing.
2. Radio button text would cut off a bit.
3. Some changes did not reflect in the designer immediately after updating the properties (and sometimes did once clicking in the designer or saving and refreshing).

When expanding description on template, it is moving the other columns onto a second page, even though on the template it is showing they will all fit on page [00131545]

We made customizing a table more intuitive, informative, and restrictive, with the goal of visually aligning the designer's version of the table with the PDF version.

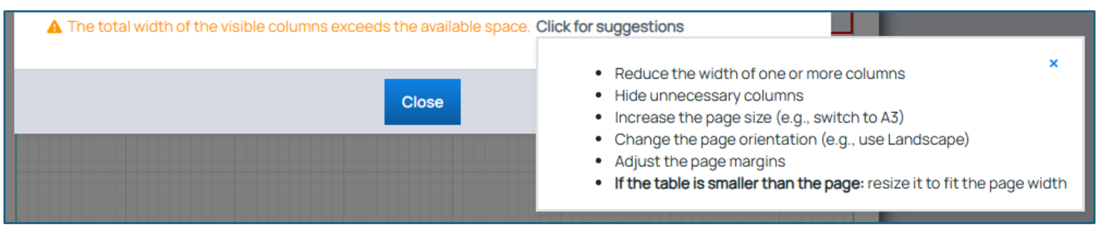
- The last table column in the PDF file used to span the remaining available space, and users had no way of controlling it. This functionality has been removed to allow users full control over the width of the last column.
- Users can resize the table to be narrower than the page size.

- Columns that do not fit within the width of the current page size (or table size, if less than full width) are not printed. The previous version allowed a table to overflow and wrap, causing it to split the data into two separate “tables”. This made it hard to read and hard to associate the partial data with the item it belonged to. To keep the information readable, the table now only prints the first columns that fit, and it is up to users to adjust them the way they want the information to fit. The designer table hides the excess columns accordingly.

Note: This new behavior might affect existing custom forms with column widths that exceed the width of the page. These will have to be manually adjusted to fit. This new change also requires the stock versions to be re-synced to guarantee they fit the page width.

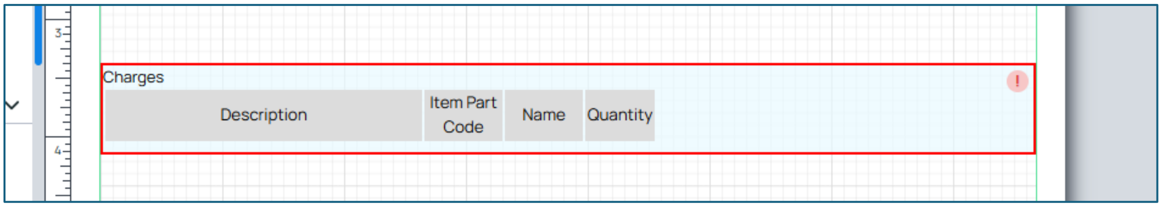
- The page also displays a warning if the new width is wider than the current page width or the table width (if smaller than full width)

- When clicking on Click for suggestions, an information box opens with the different actions that can be taken to adjust the table’s width:

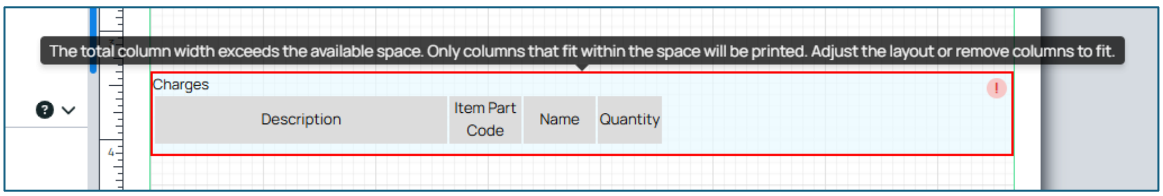


- These are the different actions a user can take to reduce the width of the table:
    - Reduce the width of one or more columns
    - Hide unnecessary columns
    - Increase the page size
    - Change the page orientation
    - Adjust the page margins
    - Adjust the table’s width (in designer view), if it is smaller than the page width (the Make Full Width button can be used as well)

- Closing the Edit Columns popup with the warning still showing, shows the designer's table as it would appear in the PDF file. Notice that the last column is missing because it falls outside the bounds of the page:



- The table is marked in red to indicate there is a problem and hovering over it shows a tooltip:



- To fix this, users can go back into Edit mode and readjust the width. There was an issue resizing the last column in the table, as it had no right border to drag. The right border is now pronounced and can be dragged left or right to adjust it. To see this line, make sure the table is scrolled all the way to the right.
- Column widths cannot be reduced beyond the length of the longest word in the column's header.
- Percentage being billed was removed from the stock invoice template. This was done due to only being relevant for progress invoices. Users can create a template specifically for progress invoices where this column is included in the table.

Note: About the resizable grid in the Edit Columns popup, the editable grid in this popup may look a little different than the designer table due to having a column menu (the three vertical dots on the right of each column). Sometimes when shrinking a column, closing the popup, and then opening it again, it may readjust the width of its display a bit, but the actual width (as displayed in the designer) is not affected by this adjustment. Only dragging the edge of the column to resize it changes the width of the column in the designer, and subsequently in the PDF file.

Added package to proposal from a lead and did not populate the items and parts on the package, you have to save and choose a sales package a second time for this to load [00132428]

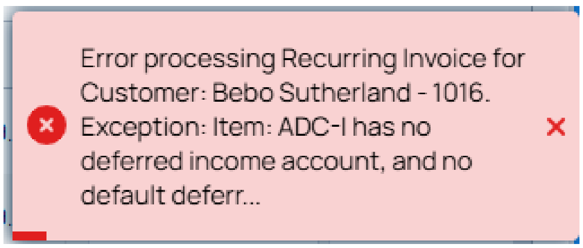
Users added a package to a proposal from a lead, but that did not populate the items and parts on the package, they had to save and chose a sales package a second time for this to load.

The proposal will suggest populating the package's items and parts during the first load. This will ensure all necessary components are available when the package is initially loaded.

When making a single RMR invoice under the customer's RMR tab - receiving error [00132426]

This issue occurred when trying to process an RMR that had deferred items on it, but one or more of those items did not have a deferred income account (Setup > Items & Parts > Items > edit part > Deferred=YES), and no **Deferred RMR Income** account was set under Setup > Company > Preferences > GL Account tab. If the RMR has no deferred items, they will be processed without issue.

With this change, a more detailed error message will display:



Users can address this by setting the deferred income on the item identified or set up a default deferred income account under preferences.

Invoice billing address [00132603]

PDF file of invoices had a large gap between the address line and the city/state/zip.

We resolved the issue of the large gap between the address line and the city/state/ZIP code in the billing address on the invoice template.

A user is set up to see payments in permissions but cannot see any payments [00132413]

A user's permissions were set up to see Payments but could not see any payments. This was caused by the General ledger tab that is on the Payment detail page, and the user did not have the General ledger permission.

We fixed this so that users without the General ledger permission will not see the General ledger tab on the payments detail page and will not get an error.

“Originally Delivered” data on a WO invoice is before the date the invoice was created [00132824]

The originally delivered date was not using UTC like other dates, such as invoice or due date. This could cause the date to show the prior day when in the database. We fixed this.

RMR Audit Report - double entry of RMR [00133069]

We fixed this issue to ensure that RMRs appear only once in the RMR Audit Report.

Proposal sales tax on parts [133405]

The Sales Tax Code field was blank when editing a part on a proposal.

We improved the performance of the program so the Sales Tax Code field is not blank when users edit proposal parts.

Panel types appear to be missing from AlarmBiller to Managely: Managely is only showing first 20 (alphabetically) [00133229]

Managely was only showing 20 panels (alphabetically) in the dropdown.

We changed the number of visible panel types in the dropdown from 20 to 50 in Setup > Items & Parts.

Incorrect information re: QuickBooks integration in Managely [00135097]

Setup > Exports > QuickBooks and clicking the QuickBooks documentation downloaded the AlarmBiller branded QuickBooks integration guide.

The Setup > Exports > QuickBooks > QuickBooks documentation link now directs users to the correct URL as listed in the description. Additionally, the link in the popup after clicking Export also points to the correct URL.

Work order custom grid [00134891]

Creating a custom grid layout and reordering columns in the grid duplicated the Part Code column.

We fixed this issue so the Part Code column is not duplicated.

When the appointment is confirmed by the customer, the additional tech falls off of the appointment [00135657]

We fixed this issue so that additional technicians on an appointment remain on the appointment when it is confirmed by the customer.

User should be able to add a deposit to a work order in a view mode

We made these changes so users can add a deposit to a work order in view mode:

1. The Work Order Deposits tab/grid is visible only on the view mode of a work order.
2. The Add Deposit Invoice button is displayed in the grid.
3. The Add Deposit button is only available for users with the edit work order role (Setup > User Manager > Edit User > Permissions tab > Work Orders section > Edit permission = YES) to keep current restrictions.

Account Receivable GL issue [00135834]

There was an Accounts Receivable GL issue where the details did not agree with the balance. We fixed this issue by updating the GL Entry Details Grid to prevent duplicate rows from appearing.

STILL unable to apply a credit to a bill in AP [00135938]

This issue was caused when applying a credit to more than one bill, and the bills have some amount already applied (from a previous credit or payment). The program was taking all these bills into account (where their Applied Amount > 0) and not properly filtering only the ones selected (checkmark toggled by the user), and so the sum of these bills' applied amounts did not match the applied amount on the credit.

This is now fixed so that only selected bills will be considered when validating the Applied Amount on the credit matching the sum of the bills.