Managely Release Notes

May 2025

Version 5.3.47

Contents

Enhancements

CRM > Customers

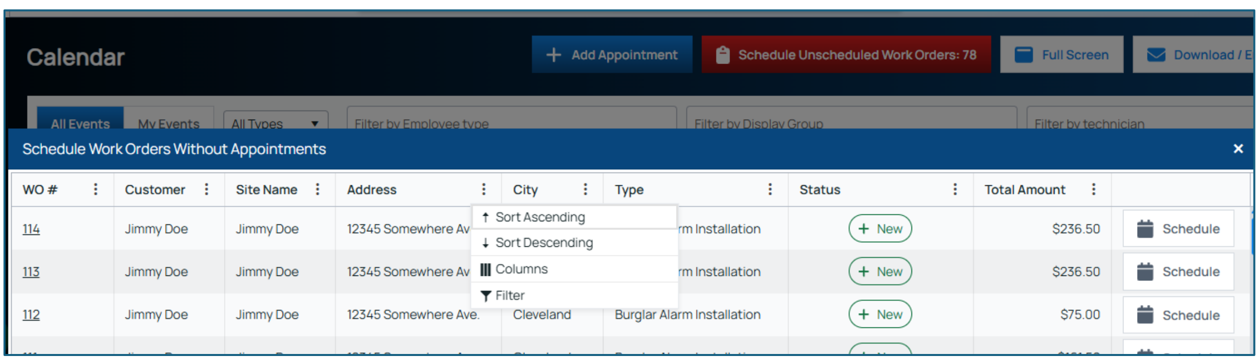
Auto Incrementing Site Number on New Site [00118301]

When creating a new customer and customer site using the customer wizard, the **Site Number** field automatically starts with "1". (For dealers familiar with the AlarmBiller product, this functions the same way as AlarmBiller.)

Calendar

Added City as a Column to Use When Scheduling Work Orders in the Calendar View

In the calendar, when scheduling the unscheduled work orders (clicking the red **Schedule Unscheduled Work Orders** button on the top toolbar), the grid now displays the site Address and City. Users can filter and sort the City column.



Application Corrections

Canceled RMR showing In Top 10 Customer Active Recurring dashboard [00122455]

On the home page, in the Customer PowerBI report tab, the Top 10 Customer Active Recurring card and its drill down report, were incorrect. These were supposed to show the top 10 customers by the total monthly amount from their active RMR entries. The report was incorrect in these points:

- It included canceled RMR records in its sum of the RMR monthly amounts.
- It included customers based on the total of their invoice amounts due instead of the sum of their RMR monthly amounts.

We fixed both issues.

Top 10 Customer Active Recurring - report change [00122456]

The Power BI report widget Top 10 Customer Active Recurring should display in hundreds or thousands.

We changed how the values are indicated on the report. For any values over $1000, it will show as a multiple of 1000 with the K indicator. Any less than $1000 will show as the actual value. For example, if the top 4 are $11,000, $1,100, $100, and $50, they will be displayed as $11.0K, $1.0K, $100, and $50.

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 and the customer name now display the same way they are typed in the textbox.

Dark mode BI dashboard illegible [00129014]

On the home page when using Managely in dark mode, some cards in the Summary PowerBI report tab were unreadable. There were also some inconsistencies in the other cards with displayed colors while in dark mode.

We fixed these cards so they are readable and fixed the color inconsistencies.

Default invoice change [00128827]

The new customer template update feature was updating some customers but not all of them.

We corrected this so that setting a default template updates all customers.

Terminating site [00134513]

Users were unable to make a site inactive that had a voided work order tied to it. We fixed this issue.

The toggle switches on bank reconciliation need to be fixed [00134759]

While reconciling bank statements, if users selected the checkbox to the left of the Date column to select all items in the grid, they could not clear any individual checkboxes for items in the grid. Conversely if users selected all items individually, the select all checkbox to the left of the Date column was selected, and users could not clear the checkbox for any single item and needed to start over.

We fixed this so users can select all items and then clear checkboxes for individual items.

Unable to reorder items within a group on proposal [00135168]

On a proposal, if there were multiple groups on the Charges tab, users wanted to reorder the items within each group but were unable to.

We resolved this issue so that if there are multiple groups on the Charges tab, users can reorder the charges in the groups.

Templates text box needs to display the default font family and the default font size [00135264]

The templates text box should display the default font family and the default font size instead of displaying the value of the selected font family and font size.

We updated the font size and font list data source on the screen.

Error message when copying site/system from one customer to another [00135446]

We corrected an error that users received when trying to copy a site and system from one customer to another by adding a site; using the Copy Existing Site feature; and checking both Copy Systems and Inactivate Original Site/Systems.

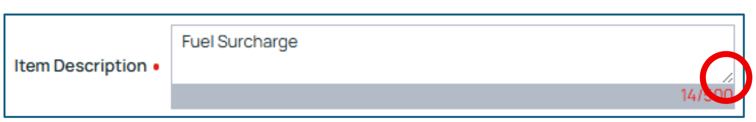
Reordering Items within a group on a proposal is difficult [00135442]

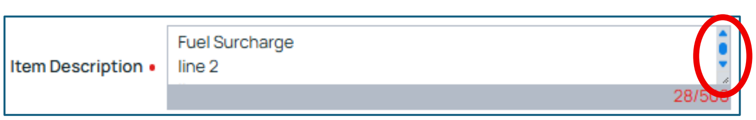
We resolved this issue so that if there are multiple groups on the Charges tab, users can reorder the charges in the groups.

Item Description is a run on sentence and needs to be a drop down [00133995]

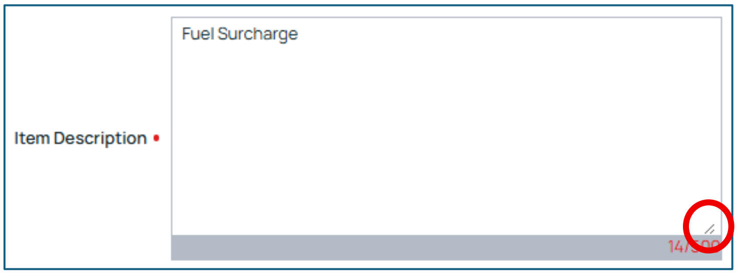
Item description should work in Managely the same way it does in the AlarmBiller product.

We changed text boxes to text areas for items, parts, and part kits so the Description fields look and act like this:





When a description has multiple lines, users can click and hold the mouse button to resize the description field to see additional text, or they can click the up and down arrows on the right side of the description box to scroll the description text.



We made this change in the following areas:

- CRM > Proposal Details > Edit Proposal > Add and Edit Items, Parts, and Part Kits
- Accounts Receivable > Invoice Details > Edit Invoice > Add and Edit Items, Parts, and Part Kits
- Accounts Receivable > Work Order Details > Edit Work Order > Add and Edit Items, Parts, and Part Kits
- Accounts Payable > Bill, Receipt, and Credit Details > Edit > Add and Edit Items, Parts, and Part Kits (Note that here the description cannot be changed, so the character counter at the bottom of the text area is not shown.)