Managely Release Notes

May 2025

Version 5.3.48

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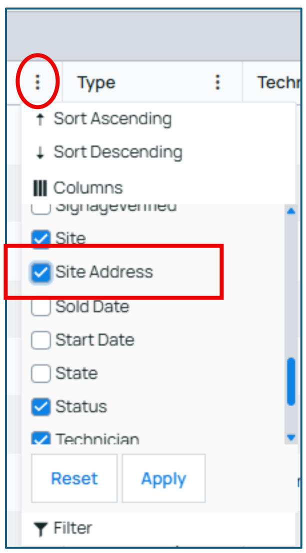
Enhancements

Accounts Receivable

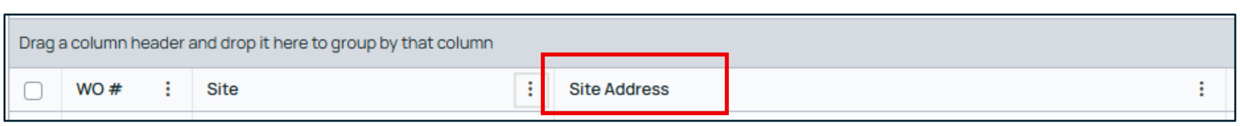
Added Site Address Column to Work Order Page Tabs [131915]

We added the Site Address column to the Open Work Orders tab, Appointments tab, Closed Work Orders tab, and Void Work Orders tab on the Work Order page (Accounts Receivable > Work Orders). By default, this column is hidden. Users can add this column to the grids:

1. Click the three dots beside any column name.
2. Click **Columns**. This shows a list of available columns.
3. Scroll down to **Site Address**. Select the checkbox.
4. Click **Apply**.



The option for columns closes. The column is shown in the grid.



Users can sort and group this column like other columns.

Accounts Receivable: Dropdown Sorting and Item Code Addition

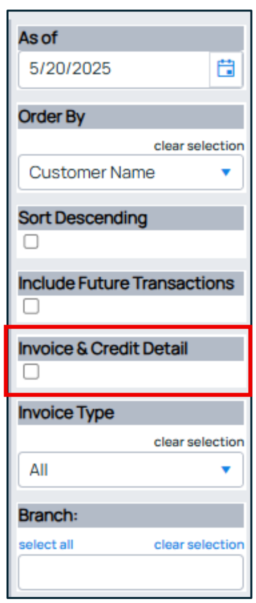
We added sorting functionality to dropdowns to help users find and select options more efficiently. Item codes will be displayed alongside item names in item-related dropdowns to allow for better identification, reducing confusion and errors. These are the affected modules:

- Invoices (and credits)
- Payments
- RMR (add and edit)
- Work Orders
- Calendar
- Collections

Reports

Option to Show Invoice and Credit Details on the AR Aging Report

On the AR Aging Report (Reports > Accounts Receivable > AR Aging Report), we added an option to print invoice and credit details on the report.



If users clear this check box, the report will print a summary.

Application Corrections

Invoice is creating second page that is blank [00130725]

We fixed an issue with the invoice template so that it no longer creates a blank second page when it is only one page.

Display error with next RMR process generation screen - master invoices [132528]

When users manually processed master invoices after processing regular invoices, the Next RMR Process date was a month off. The date did not switch to the master invoice's next RMR process date; the date stayed with the regular customer processing date.

We corrected this so that processing master invoices after regular invoices will use the dates of older invoices of the master customer and display the date correctly.

Specific Work Order: Completed work order and invoice was created but it did not close work order [00132408]

User reported changing the status of a specific work order to completed, which created the invoice but the work order did not close. They had to manually change the status of the work order to completed and close the work order.

We could not reproduce an issue described for the specific work order. However, we found that the dealer received an error when trying to print a different work order. The PDF file generation stalled while trying to pull work order with its many appointments. This only occurred on work orders that had too many appointments, items, parts, or part kits. In this case, the specific work order had hundreds of appointments. This correction fixes the Printing Work Order and optimizes the work order PDF file generation through the page itself.

eForms issues with invoices and proposals [133615]

Users reported two issues with templates: on the invoice, they could not add the page number to the footer; and on the proposal, the $ symbol was not shown when using variables to display the subtotal, tax, and total amounts.

For the invoices issue, the page number was not shown because it was only valid on page headers/footers, not the footer. We fixed this so the page footer and footer are available in all template types, for new and existing forms and form instances. We also fixed the height of the footer in the default invoice template, because one of the elements inside it was loading with an error due to extending beyond the height of the footer section.

For the proposal not displaying the dollar sign, this was fixed in a previous release and should be shown when creating a new copy of the default template (after clicking the Sync Default Templates button). However, we changed the way the dollar sign gets placed.

New Timezone required field at customer & site level causes data error [134263]

When opening a customer, users got an error “Data is Null. This method or property cannot be called on Null values.”

This error was caused by a contact’s last name being NULL. A contact’s last name is required but was nullable in the database. Any entries where the last name was NULL caused the error. To fix this, we changed the database value of the field aContact.LastName to NOT NULL.

Part code not on proposal [00135090]

When a part kit that had no Description was added to a proposal, and then printed, the Charges table on the form would display a blank for the Description column. We changed this so that the part kit code (as defined in Setup > Items & Parts > Part Kits) will be used if the Description is empty.

When print previewing proposals, it does not print on my default template, I have to click on the override template and choose my default [136474]

When printing proposals (using the button in top right of proposal detail page), if the **Override Template** switch is set to NO, it will now use the default proposal template defined in Templates & Forms > Templates. Additionally, once a proposal has been printed, the template used is saved to the database, so the next time the proposal is printed, it will automatically use the previously chosen template. Users can select an override template to change to another template.

Option to show credit and invoice detail on the AR Aging Report [00129498]

We updated the AR Aging Report (Reports > Accounts Receivable > AR Aging Report) by adding the option to include Invoice & Credit Detail; increasing the Branch Name column size; and fixing the issue of the Grand Totals running into each other.

E-Form Issue [00137577]

Some issues users reported when clicking Templates > Design (on any template) > Preview — the logo was missing or misplaced; there was a second page but that second page could not be viewed when editing the eForm; or the page was duplicated.

We fixed these issues with the eForms.