Managely Release Notes

September 2025

Version 5.3.54

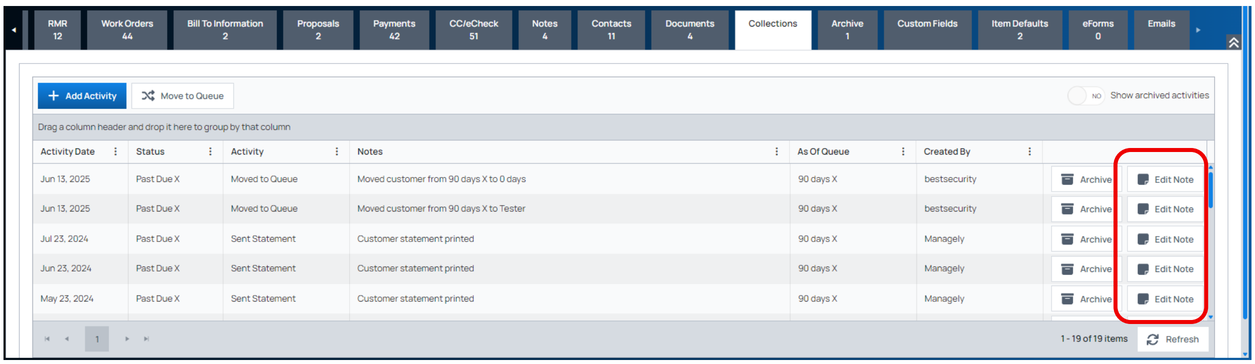
Contents

Enhancements

CRM

Added Edit Note Button (Customer Detail, Collections Tab) [00135485]

On the Customer detail page on the Collections tab, we added an **Edit Notes** button to each row in the grid. Users can click this button to edit notes directly from this tab.



Accounts Payable

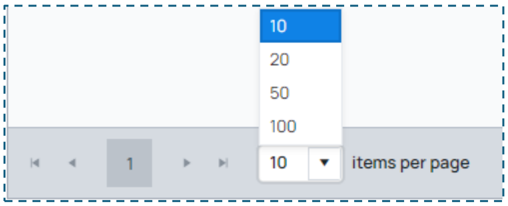
Added Sort Ascending and Descending to Tab Columns on Purchase Order Details Page [00142591]

On the purchase order detail page (Accounts Payable > Purchase Orders > PO# hyperlink), we added column sorting to the columns on the Items tab and Parts tab. Users can click a column heading to sort the rows in ascending or descending order by the values in that column.

We also added a kabob menu (three vertical dots) beside the column names on the tabs so users can filter and sort grids.

Added Items Per Page Selector to Items and Parts Tabs on Purchase Order Details Page [00142586]

On the purchase order detail page (Accounts Payable > Purchase Orders > PO# hyperlink), we added a selector for number of items per page to the bottom left of the grids on the Items tab and Parts tab. Users can select to show 10, 20, 50, or 100 items per page:



Setup

Setup > Company > Dropdown Sorting and Item Code Addition

We added sorting functionality to dropdowns 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:

- User Manager
- Company Info
- Preferences
- System Defaults
- Employees
- Theme Editor

Setup > Items & Parts > Dropdown Sorting and Item Code Addition

We added sorting functionality to dropdowns 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:

- Items
- Parts
- Part Kits

Setup > Dropdown Sorting and Item Code Addition

Additional dropdowns now have sorting functionality to help users find and select options more efficiently. Item codes are displayed alongside item names in item-related dropdowns to improve identification and reduce confusion and errors. These changes apply to these:

- County dropdown in Setup > Other > Authorities > Add/Edit (Authority dialog)
- Tracking Type dropdown in Setup > Time % Attendance > Pay Codes > Add Pay Code
- Preferences dropdown in Setup > Time % Attendance > Preferences

Application Corrections

Credit showing error [00135832]

Under a customer in the payments tab, there were payment details listed as "Credit -" and when clicked, an error was displayed. These erroneous entries are for refund checks. These grids were meant to show when payments were applied or unapplied to invoices or credits and did not handle the payment applied records for refund checks.

The grids now filter out refund checks from the payment details.

Sales tax from customer to proposal to work order [00136357]

A dealer reported that when creating a new proposal, the proposal's default tax rate was not being set to the tax rate of the site. This may have happened due to a timing issue when pulling the customer sites and the tax rates for the drop downs.

To resolve this, we made a change calling tax rates. If the tax rate ID has already been set and exists, Managely does not change it. If the tax rate ID has not already been set, Managely sets it to the default.

When populating a work order and selecting a service package, the system does not add the service package parts kit to the work order [137373]

The functionality that added items, parts, and RMRs to a work order when selecting a sales package did not include logic for part kits, so regardless of the package being selected, no part kits were added. This has been updated to also include part kits.

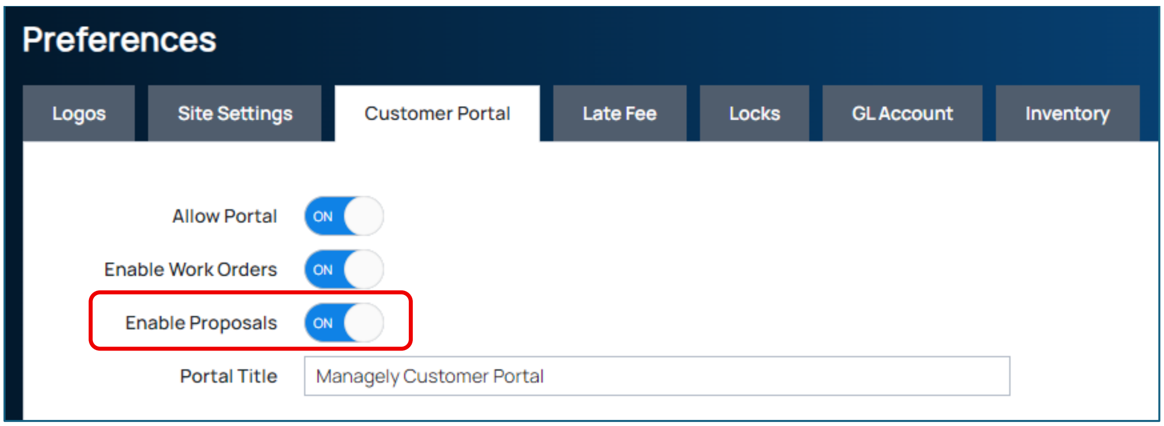
Balance sheet bank account showing overstated [00137406]

We fixed the issue where the register balance on the bank reconciliation report was being calculated incorrectly by adding payments instead of subtracting them.

Proposal PDF file different from view in portal [138402]

When emailing a proposal template to a customer, the PDF file in the email was the correct template; however, when customers logged into the customer portal and viewed the proposal, it was the old template.

The customer portal proposal view now correctly uses override templates when proposals are viewed. Proposal visibility is now configurable via a new **Enable Proposals** toggle on the customer portal preferences (Setup > Company > Customer Portal tab), allowing control for users. This streamlines proposal management.



Reports pulled in different time zones [141075]

If a user ran a report in one time zone and another user ran the same report from a different time zone, the report for the second user reflected different data.

We resolved data inconsistencies in the profit and loss report caused by date differences.

Large PO receipt generation issue [00141093]

A user reported issues with generating a receipt for a large purchase order; when editing part quantities, the system displayed incorrect part details. For example, a part with a quantity was mislabeled and mispriced.

We fixed the issue when wrong receipt part/item/part kit details were loaded when editing them.

Managely customer portal shows the Time & Attendance counter at the top of the screen [00141371]

The Time & Attendance Timer was showing up for all users and not just the user who started the shift. After a dealer-user started a shift, the shift timer in the header was retained after logging out and logging in with a different user if the browser was not refreshed. We fixed this issue.

Vendor dropdown on add check [00140793]

When adding a check from the bank account and changing the vendor in the drop down on the add check screen, the payee or address field were not updated.

With this fix, when creating a check from GL > Bank Accounts > select a bank acct > Add Checks, the following vendor fields will be automatically populated when a vendor is selected from the dropdown: Bank Accounts, Address, and Payable. These fields directly map to the fields set on the vendor: Payable To and Mailing Address.

Issues with PDF file page sizing, font auto-sizing, and preview errors in single-use forms [00141566]

Users encountered some issues when uploading PDF files for single-use forms:

1. Page Size Conversion Error:

   The original PDF contained a mix of legal and letter-sized pages. Upon uploading to Managely, all pages were converted to legal size. This caused the top portion of letter-sized pages to be mirrored/copied to the bottom of the now-legal-sized page. Fields placed on the form appeared in incorrect positions after the agreement was executed.

2. Font Auto-Sizing Issue:

   The font was not auto-sizing to fit the input boxes. This caused data to be cut off when entered in the form fields, affecting readability and accuracy.

3. Preview Functionality Failure:

   After saving the document, users could not preview the form. Preview attempts caused errors.

To fix issues, we added PDF file varying page size handling. This resolution did not address the issue with the text boxes being too short as this can be adjusted by expanding the textbox in the designer.

RMR Process Date is displaying the incorrect date (one day ahead) 142081

We changed the date picker for the RMR Process Date to account for the date differences in time zones between UTC and local time We changed the database field for the RMR Process Date so that the end-of-day time is captured precisely.

Customer RMR tab count not displaying correctly for master customer [141601]

There was an intermittent issue with the customer RMR tab in Managely, specifically affecting master customer accounts with sub accounts. For example, a customer showed one count of RMRs on the summary review, but when clicking the customer RMR tab, the count changed.

The Customer RMR tab count will now display the correct number of RMRs. For master customers, it will only include sub customer RMRs that have the Invoice to Master? option checked, so that it matches what is displayed in the grid.

Date error [142314]

When users added a critical note to a work order and set an expiration date, after saving it the expiration date and time would change.

The issue with the date and time changing was caused by time zone differences when saving. We fixed this issue and changed how the dates are displayed on the Notes tab. On a work order, on the Notes tab, the dates are displayed without the time component.

The ‘Rate’ column on a receipt needs to be changed to ‘Cost’ [00142595]

On receipts, we changed the column heading Rate to Cost. This affects the following grids: Receipt Parts, Receipt Part Edit, Receipt Items, Receipt Item Edit, PO Items, PO Item Edit, Bill Items, Bill Items Edit, Bill Parts, Credit Items, Credit Items Edit, Credit Parts, and Credit Parts Edit.

Lack of duplicate alert and auto assignment of next number [00142457]

The system did not alert users when a PO number had already been used. Instead, it silently assigned the next sequential PO number creating conflicts and incorrect assignments.

We added a duplicate verification that is triggered when a purchase order number changes. We also added a second layer duplicate verification before a purchase order is created or saved to stop the user if another user has just used the same purchase order number while both are creating or updating POs at the same time.

Refund receipt displaying a positive value (makes the refund look like a payment) [142659]

Receipts had the original date of the charge and not the refund date. Also, receipts did not show that it was a credit back; it looked like the original charge or another charge.

We changed the way information was shown on receipts.

When opening a reference item from a task in its own window you are taken a blank page [142850]

We fixed this issue so links opened in a new are not blank but display the expected data.

Changing the status of a proposal to 'Ready for submission' causes the proposal to be removed from the customers page [00142793]

We resolved an issue where proposals set to Ready for Submission were not visible on the Customer page, Proposals tab.

On a PO the work order address is displaying a comma next to the state, this is grammatically incorrect [00143160]

We corrected the address by removing the comma.