Managely Release Notes

December 2025

Version 5.3.58

Contents

Enhancements

Note: Due to an update to grids, if users find that scrolling through tabs using a mouse wheel no longer works, they can scroll through tabs while pressing and holding the Shift key on the keyboard and using the mouse wheel.

Accounts Receivable > RMR

(Pro) Invoice Enhancement- Show Quantity and Total Detail in Line-item Roll-up

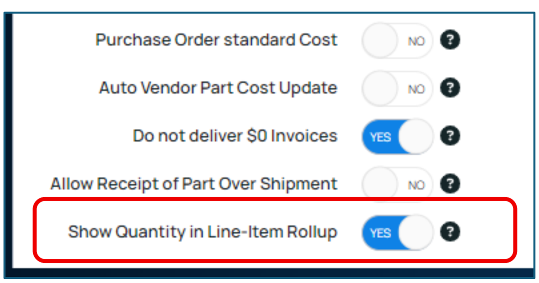
This is a Managely Pro feature.

For billing users, we added a Pro license level feature to roll up multiple quantity-based recurring line items into a single invoice line that displays the total quantity and total amount. This gives their customers a clear, consolidated view of recurring charges while Managely maintains itemized details for reporting, reduction, revision, and compliance.

In previous versions of Managely, when using quantity based RMR and the Sub-Item Of roll-up function, the invoice displayed only a generic rolled up line. The summed quantity of the child lines was not shown on the invoice. Users could not reconcile billing when quantities and rates varied.

In this version of Managely, we made these changes:

Change 1: We added the **Show Quantity in Line-Item Rollup** switch in Setup > Company > System Defaults.



Change 2: Invoice Enhancement for RMR Roll-Up Items:

We changed the RMR invoice generation process where items are configured as roll-up and the Quantity Billing option is enabled.

Previously, these items were always displayed with a quantity of 1. After this update, the actual quantity stored in the database can be shown instead.

To activate this behavior, ensure both configuration flags are enabled:

- Setup > Company > System Defaults: Show Quantity in Line-Item Rollup = YES
- RMR Form: Show Quantity = YES

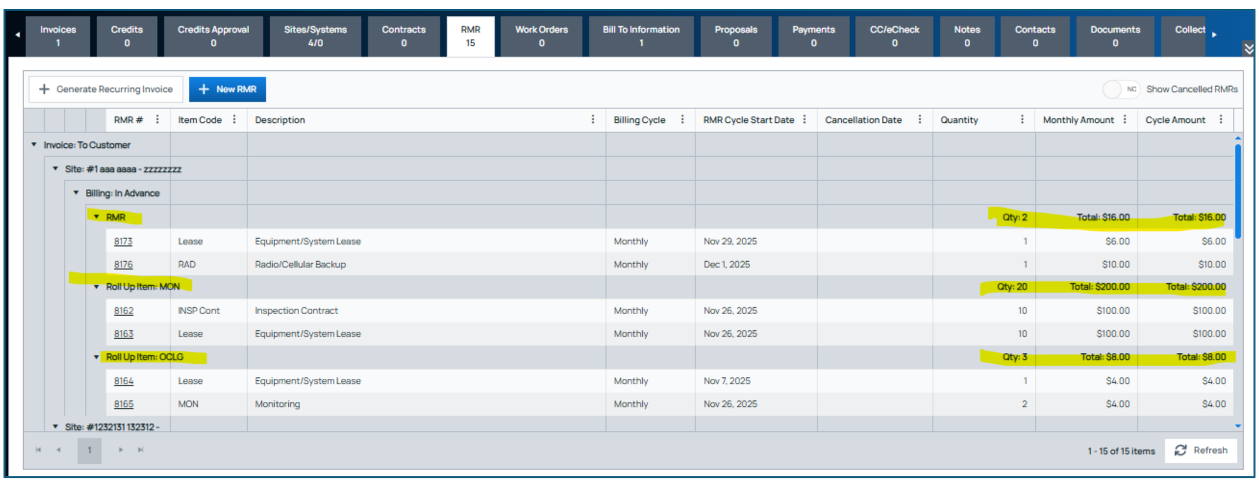
Change 3: Customer RMR Grid Enhancements:

We introduced a new grouping structure on the customer RMR grid page for better visibility and billing verification. The grid now consists of a new group header regarding roll-up Item code. It has two sections:

- RMR: Displays items that are not roll-up.
- Rollup: Displays items grouped under their respective rollup item code.

We added a Quantity column to enhance clarity:

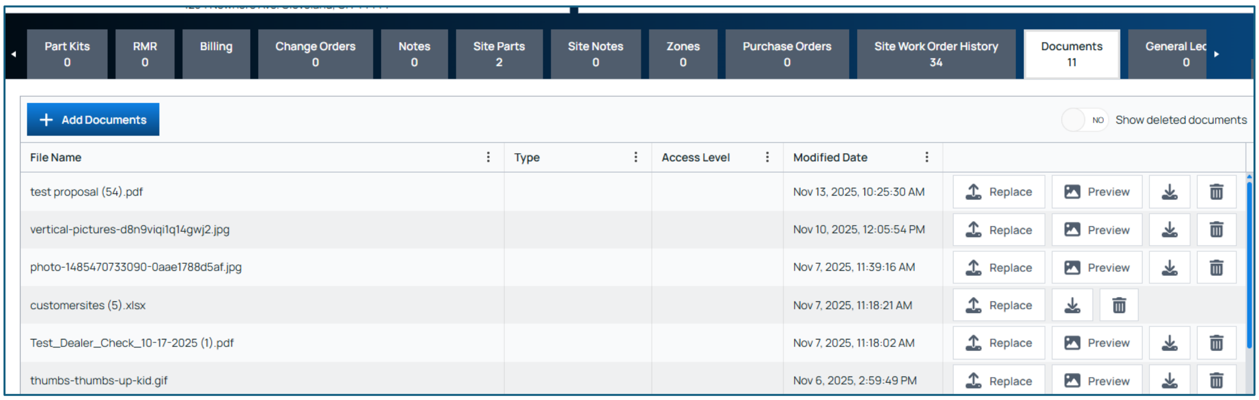
- If the RMR is non-roll-up and Quantity Billing is disabled, a default quantity of 1 is displayed.
- If Quantity Billing is enabled or the item is a roll-up, the quantity displayed will be the value saved in the database:



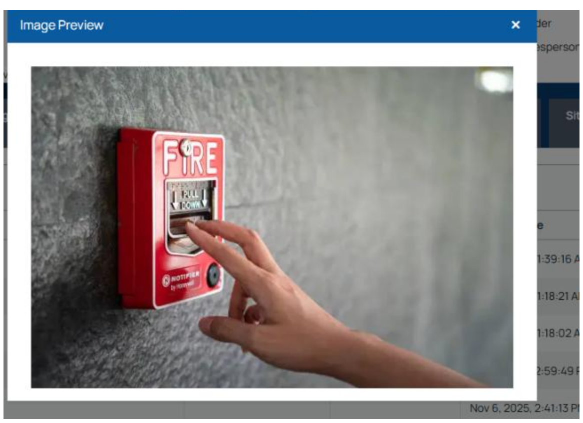
System Wide

Preview Button for Photos and PDF Files [00147134]

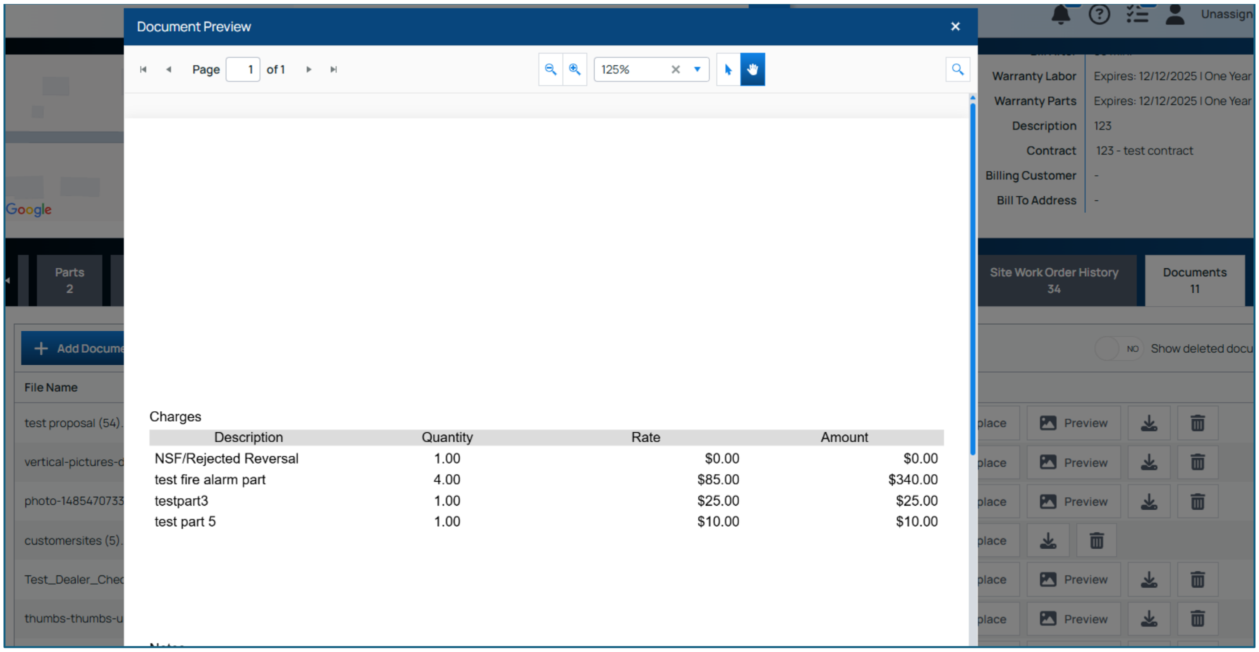
The Documents tab on the work orders page (and any other page that has a Documents tab) now has a **Preview** button next to any file that is a supported image format (.jpg, .png, .webp, .bmp, .svg and .gif):



Clicking preview displays the image in a popup window:



Additionally, users can preview PDF files:



This affects all places that have a Documents tab:

- Tasks (in top right toolbar) > Edit Task > Documents tab
- Accounts Receivable > Invoice details > Parts tab > Docs button > Documents popup
- Accounts Receivable > Work Order details > Documents tab
- Accounts Receivable > Work Order details > Parts tab > Docs button > Documents popup
- Accounts Receivable > Work Order details > Site Parts tab > Docs button > Documents popup
- Accounts Receivable > Work Order details > System Parts tab > Docs button > Documents popup
- Accounts Payable > Vendor details > Documents tab
- Accounts Payable > Bills/Credits/Receipts details page > Utilities tab > Documents tab
- CRM > Customer details > Documents tab
- CRM > Customer details > Contracts tab > Contract details > Documents tab
- CRM > Proposal details > Documents tab
- CRM > Customers > Site tab > Site details > Site parts > Docs button > Documents popup
- Customer Portal > Documents tab
- Customer Portal > Proposals > Documents button on the right

Application Corrections

Receiving error when using the copy site feature [00105259]

We were unable to reproduce this error when using the copy site feature.

Work order closed date inaccurate [00132031]

The work order close date had a time zone conversion, which made it appear a day behind. We changed the work order close date so it does not convert for time zone.

Leads assigned not showing in leads [00134421]

Salespeople could see their leads using the links in the emails automatically sent to them, but they could not find their leads on the CRM > Leads page.

We fixed this by setting the Show Assigned Leads flag to true for salespeople, so they can see all leads assigned to then on the CRM > Leads page without needing an administrator to change permissions. This flag controls lead visibility for assigned users.

Cannot complete work orders that have deleted purchase orders tied to them [00140169]

The check whether a purchase order was resolved or not was only checking the resolved field. In the instance of a voided or deleted purchase order, it would still be unresolved and inactive.

We added a check to see if the purchase order is inactive as well to determine if the work order can be closed or not.

Purchase order changing from ‘submitted’ to ‘open’ when an edit is made [00144251]

We resolved this issue so that after a purchase order is submitted, editing it will not change its status from submitted.

Custom grid layouts not working within proposals [00145220]

We fixed this issue to ensure consistent toolbar behavior.

Work order and proposal numbers jumped [00146394]

Users reported that the next proposal/work order number unexpectedly jumped (for example, from 225 to 2225).

We resolved this issue with the following changes:

- We added a new field called WorkOrderNumber to WorkOrders that is used to retain work order numbers in sequential order.
- All pages now display the new field WorkOrderNumber (instead of the WorkOrderId).
- When adding parts and items to a purchase order with a work order, the number under Work Order column for both items and parts correctly displays the Work Order Number.

Customer name/number does not populate when entering invoice number in payment batch [00147430]

We fixed an issue where the customer's name did not appear right away when selecting invoices on the New Payment Batch screen. The customer's name now shows up correctly as soon as the invoice is chosen.

New deposit will allow you to save without selecting a payment type [00147549]

We disabled the Save button until all required fields are complete on the deposit page.

Receiving error when adjusting the item order within a package [00148064]

We fixed this issue and rearranging the order of items (or updating an item) will no longer cause an error.

Issue with export for deposits [00148269]

An Excel export only exported the current page instead of the entire deposit.

We changed the export function to include all grid rows that are in the deposit details.

New payment batch screen does not populate customer name when searching by invoice [00148156]

When searching by invoice in the New Payment Batch screen, the customer name/customer number field did not populate.

We fixed an issue where the customer's name did not appear right away when selecting invoices on the New Payment Batch screen. The customer's name now shows up correctly as soon as the invoice is chosen.

Unable to remove denied/rejected transactions [00148069]

We fixed an issue preventing users from removing transactions from the Denied/Rejected tab on the CC/eCheck page. They received an error message stating "There are no Transactions to remove from the list."

Exporting appointments [00148402]

An Excel export only exported the current page. We changed the export function to include all grid rows that are in the work order appointment details.

Filtered RMR export to Excel - blank data [00148890]

The export to Excel did not include filtered RMRs.

We fixed this issue and now all filtering is handled once on the server. This also improves export operations as only sorting and grouping happens on users' computers.

Monthly RMR generation issue [00148536]

A customer had two RMRs for a six month cost. When their invoice generated on the first of the month, only one RMR item generated on the invoice, and their automatic payment ran for less than the total cost.

The issue was caused by the Next Invoice Date on those RMRs having a time component. When the RMR process runs, it compares the Process Date with each of the RMR's next invoice date to determine whether they are included in the run. The time component offset the Next Invoice Date so they fell after the RMR process Date (which has 0:00 time) and were excluded from the run.

This is now fixed so that the process only compares the date portion of the Next Invoice Date and RMR Process Date to avoid time(zone) offset issues.

Some December cycle invoices did not generate [00150212]

This is now fixed so that the process only compares the date portion of the Next Invoice Date and RMR Process Date to avoid time(zone) offset issues.

We can no longer scroll left to right on our calendar in order to see all of all technicians jobs & The plus sign that allows you to read all the notes at once is gone [00150525]

Fixed Calendar Schedular issue where scroll bar wasn't appearing in Technicians view.

We fixed an issue that prevented users from expanding notes because the + icon was missing.

Unable to expand notes [00150517]

We fixed an issue that prevented users from expanding notes because the + icon was missing.

Clicking on an appointment in Calendar Schedular in Day/Week/Technicians view randomly highlights several different appointments

We fixed this issue with the calendar scheduler.

Unable to edit amount applied from unapplied cash to an open invoice [00151091]

Users were unable to apply only a portion of a payment in unapplied cash to an open invoice. Users could not edit the payment amount field.

We fixed this issue. This issue was also appearing in the following screens and was fixed for them as well:

- Accounts Receivable> Invoices > Credits tab > Credit Details > Apply Credit button > Apply Credit page
- Accounts Receivable > Work Orders > Work Order Details > make sure there are parts with Stock turned off > Purchase Orders tab > Create Purchase Order button click > Create Purchase Order dialog

Note there are key differences from the previous working version:

- When the switch is turned on, the Payment Amount cell becomes editable but does not highlight the existing cell value. An additional click is needed for the highlight.
- To tab out of edit mode, two tab keystrokes are needed: the first to highlight the value, and the second to exit edit mode.
- The enter key also exits edit mode.