Managely Release Notes

December 2025

Version 5.3.59

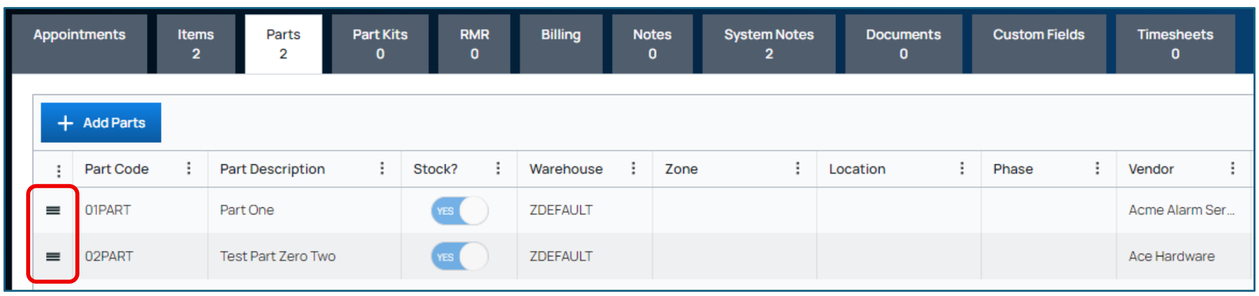
Contents

Enhancements

Accounts Receivable

Part Reordering on Work Order Parts Tab [00148662]

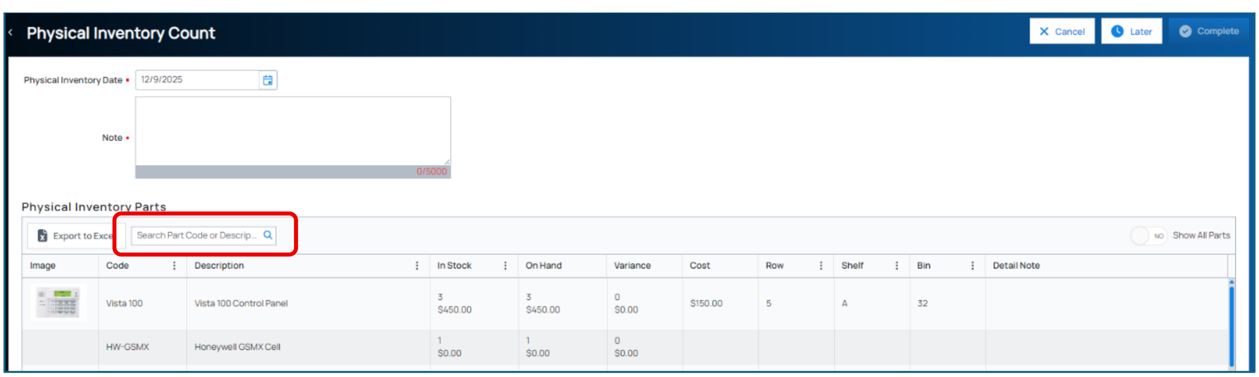
On the Parts tab in proposals, users can adjust the part order by moving parts up and down. We added this functionality to the Parts tab on work orders. To reorder parts, edit a work order, and click the Parts tab. Reorder parts using the three horizontal lines to the left of the part code.



Inventory

Added Search Function to Physical Inventory [00148140]

We added a search to the Physical Inventory Count page (Inventory > Warehouses > Warehouse Code hyperlink > Physical Inventory tab > Create Physical Inventory button). Users can search by part code and description. This is a search field above the grid columns beside the Export to Excel button:



System Wide

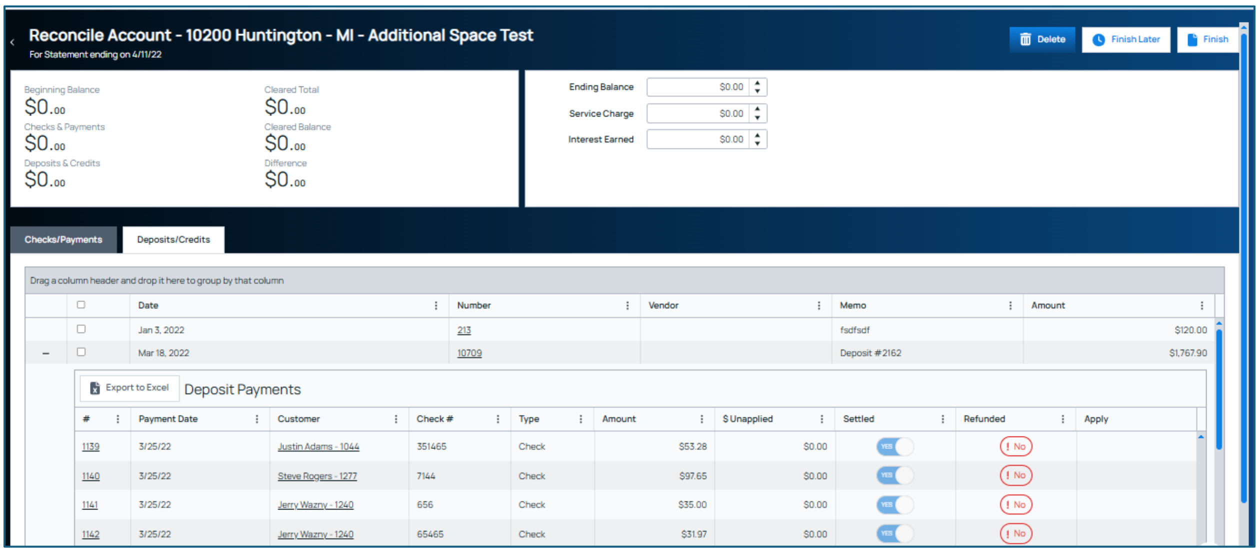
Enhancements to Photo/Document Viewer

We improved the image and PDF previewer on the Documents tab. When users click the preview button and the image or PDF file opens, there are arrows on the left and right sides to scroll through the available documents in the grid. The title bar of the image or PDF file shows the filename of the document.

GL

Reconciliation Enhancement- Expandable Sub Grid for Payments Under Deposit

We changed the grid on the Reconciliation page (GL > Bank Accounts > Bank Name hyperlink > Reconciliation tab > End Date hyperlink > Reports/Credits tab) so that users can expand a deposit and see all payments included in it. This helps identify the customer payments that make the deposit.



Application Corrections

BI Dashboard resets every time you log out [00123650]

Dealers reported that when logging into Managely, the Power BI reports that show on the home tab were not loading unless the page was refreshed.

This was caused by these dealers missing the default Managely Theme (rCustomTheme) records in their databases. There was an error when loading the BI reports caused when trying to read if the current theme was in dark mode, but there were no themes to read.

The missing default themes have been restored on all dealers who were missing them, so dealers should be able to see their BI reports on login.

Work Order Closure Performance BI table is displaying incorrect values [00125824]

On the Power BI, the open work order calculation only checked the closed date rather than the workorder status and did not filter out void or inactive work orders. We resolved this.

Work Order Billings by Type BI table is displaying incorrect values [00125826]

We corrected this issue: on the Power BI, the open work order calculation only checked the closed date rather than the workorder status and did not filter out void or inactive work orders. We resolved this.

In addition, we modified the Service Manager to calculate the work order billing by service type to be the total amount rather than net amount as that was leaving out the taxes. On the customer we were defaulting to the aging report so we corrected that, as well.

Work Order by Status BI table is displaying incorrect values [00125822]

Some filters were missing, so all work orders were showing.

We resolved this by adding these filters:

- Removed all closed work orders
- Removed all voided work orders
- Removed all recurring work orders as they are not scheduled yet
- Removed all inactive workorders

Dashboards are not loading [00137288]

The missing default themes have been restored on all dealers who were missing them, so dealers should be able to see their BI reports on login.

Inventory levels and PO [00141125]

When creating a suggested purchase order for truck inventory stock, it will only order what is displayed on the gird. For example, a dealer has 400 parts in their part list, so the parts display over four screens. Users need to create a purchase order for each page one at a time.

When creating a suggested PO, if the selected vendor/warehouse has over 100 parts (page size limit), the data is paged across several pages. Now when clicking the Create Purchase Order button, it will query for all pages of parts so that all parts are passed to the Create PO page.

Power BI report for AR was wrong [00145427]

The Power BI report in the Customer tab was wrong for AR Aging. We fixed the queries used to pull data for AR aging.

When adding a payment batch and adding a customer, invoice, amount, and check number the invoice number disappears after clicking apply [00147769]

We fixed this issue.

Last activity under work orders is not populating for us [00147768]

We added a Last Modified column (by default this is hidden) that tracks updates to the work order, not just to appointments. We added the Last Modified column to these grids:

- CRM > Customers > Customer details > Work Orders tab
- Accounts Receivable > Work Orders > Open Work Orders tab
- Accounts Receivable > Work Orders > Ready To Bill Work Orders tab

To add this column, browse to one of these grids. Click the kabob menu (three dots) beside a column name in the grid. Click Columns. Scroll down the list to find the Last Modified column. Select the checkbox beside the Last Modified column. Click Apply. The column appears in the grid.

Duplicated late fee- happened on CC and check deposit [00148600]

After careful review and testing, we could not reproduce this issue. The root cause for the extra amounts appearing on the payment or the duplicated late fee invoices is unknown.

To address these issues, we added validation to the backend to check these: 1) invoice apply amount does not exceed the invoice amount due, and 2) the late fee amount does not exceed the total late fee on the customer. These checks are made before submitting the transaction to Forte. This should reduce the likelihood of future issues with extra amounts appearing on the payment.

Additionally, we added better error logging so if the payment fails to be applied, we can log the root cause.

Data export is empty [00147986]

A dealer reported that exporting data from the Data Backup tool was not working.

This functionality was confusing, enabling a "Download" button after the export finished running, but the Download button always returned a 0 byte file. Meanwhile, when the export completed, it would download the actual export behind the scenes. Also, the form did not provide any data validation, allowing the user to enter a from date after a to date.

We removed the unfunctional and misleading Download button and added some data validation on the form to ensure the from date is always before or equal to the to date.

Critical notes missing when creating work orders directly from work order menu [00149392]

When creating a work order directly from the work order menu, the critical notes associated with the customer, site, or system were not displayed.

We fixed this so that when users create a new work order, during the creation process the critical notes will appear.

Deleting deposit duplicates several times in GL [00149274]

Deleting deposits were duplicating the deposits multiple times in the GL.

To resolve this, on the account reconciliation grid, we added grouping for GL entry details (by GLEntryId/EntityId/EntityKey). When users save, any related details will be reconciled/unreconciled with their representative detail.

Unable to send an invoice, not accepting billing address [00149399]

After careful review and testing, we could not reproduce any records where a customer was set to invoice to master, but there was no master customer. We corrected the data in this instance with a script. In addition, we added a check to prevent a situation like this from happening in the future.

Unable to apply RMR discount when billing cycle is not monthly and the discount percentage is a decimal [00149654]

We updated the RMR calculation for consistent two-decimal rounding.

Deposit not keeping invoice data [00148495]

A deposit would not keep the data of the invoice assigned to payment.

We fixed this issue and added some improvements to Add Payment(s) block (right under New Payment Batch):

- When selecting a new customer, the invoices dropdown loads faster with the subset of invoices related to the customer. The loading symbol starts earlier after the selection of the customer.
- When loading the page and first selecting an invoice (so the customer dropdown is still empty), the invoice sets the customer. (Previously, if a user changed the customer, the invoices dropdown selection was reset; now the selected invoice is retained.)

Some November cycle invoices did not generate [00149555]

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.

Part kit issues [00149973]

Part kits were not updating correctly when a work order was invoiced causing discrepancies in the General Ledger.

To fix this, we are now saving the part kit part’s amount (as allocated by the part kit) directly to the database, instead of calculating it via Rate * Quantity. This ensures the sum of each part kit part’s amount will add up to the total part kit amount. This change only affects part kits; regular work order parts will still calculate the amount via Rate * Quantity.

Invoices are not printing to the full scale of an 8.5x11 inch page [00150692]

Invoices were printing significantly smaller than the standard Letter size (8.5"x11"), even when the printer settings were confirmed to be correct.

We corrected this issue; however, users will see these changes:

- When clicking the Print button, the print dialog is opened in a new tab
- The filename defaults to “CustomFormReport.pdf” instead of “download.pdf”

When the page size is set to custom, as with some of the documents with a PDF file background that are 8.5x14, different browsers behave differently when the native print dialog displays. This behavior can be customized by changing some of the dialog settings:

- In Chrome: The page is initially cut off. To display the full length of the page, click the *More settings* text and select *Fit to paper* in the **Scale** dropdown.
- In Edge: No special action is needed as the dialog automatically adjusts to the page’s height.
- In Firefox: The full length is displayed, but the page is not centered or at full zoom. There is no way to adjust this behavior, and the recommended approach is to download the PDF file first and then print it.