



Managely Release Notes

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MANAGELY[®]

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Enhancements

General Ledger > Bank Accounts

Added Bank Reconciliation Auto-Save Function [00145879]

We made several improvements to the bank reconciliation pages and grids.

On the Reconciliation details add/edit form, we made these changes:

- Added a Save button for saving unfinished work on the bank reconciliation form.
- Added a loading indicator to Bank Reconciliation Deposits/Credits grid when users expand a deposit (noticeable on slower network speeds).
- Removed an empty column from the Checks/Payments grid.
- Removed an extra column from the Deposits/Credits grid unless any of the grid rows have the expandable details (+) button in the column.
- Adjusted the width of columns on the Checks/Payments grid and the Deposits/Credits grid to removed empty space.
- Added loading indicators for buttons on the Reconciliation details add/edit form: Save, Finish Later, Finish, and Delete buttons.
- Added a Cancel button on the Reconciliation details add/edit form so that users leave without saving.
- Hid the Delete button when adding a new reconciliation.

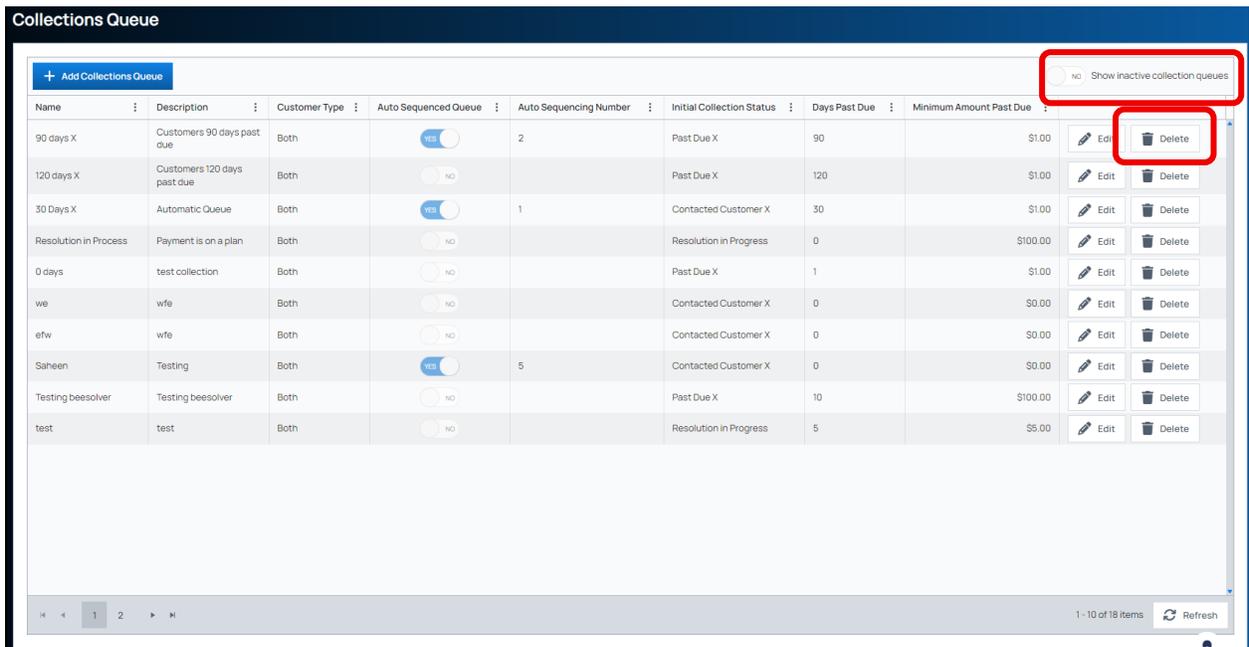
On the New Reconciliation popup, we made these changes:

- Moved the loading indicator to the center of the popup.
- Implemented a fix for pressing Enter on the keyboard while on a popup to proceed to a Reconciliation details page.
- Added verification of an existing unfinished reconciliation to give any error message before the popup is displayed (GL > Bank Accounts > Bank Account Details > Reconciliation button). This will save time for users by avoiding their interaction with a form in a popup. Before this change, users had to fill the form in the popup and proceed to details page to see the error.
- Changed the name of the Save button to Proceed and changed the color of the button.
- Added verification of an existing unfinished reconciliation to give an error when selecting a bank account from the dropdown list (GL > Bank Accounts > Reconciliation button). This will save time for users by avoiding their interaction with a form in a popup. Before this change, users had to fill the form in the popup and proceed to details page to see the error.

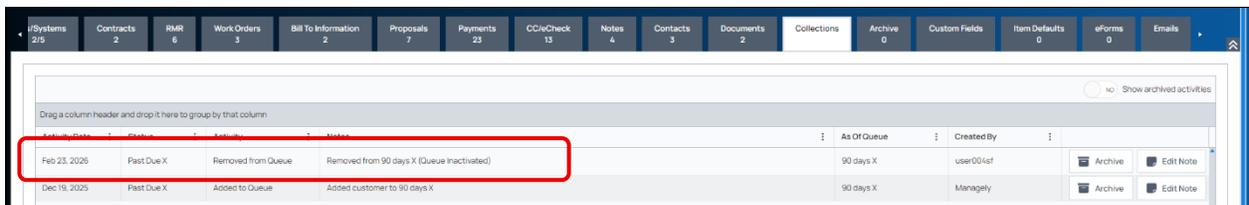
Setup

Collection Queues can be Deactivated [00102809]

We added a Delete button to the grid rows on the Collections Queue page (Setup > Collections > Collections Queue). Deleting a collections queue that has customers in the queue makes it inactive. (**Note:** If there are no customers in the queue, it is deleted.) To see inactive collections queues, change the **Show inactive collection queues** switch from NO to YES.



Deleting a collections queue that has customers makes the queue inactive and removes the customers from the queue. This is shown on the customer detail page Collections tab:



Reactivating a collections queue restores it for use but does not put customers back that were in the queue before. If users want customers in the reactivated queue, they need to add them on the Collections page (Accounts Receivable > Collections).

Application Corrections

Charge groups not appearing on proposal [00154945]

When creating or viewing a proposal, certain charge groups (groups of fees or costs) were not appearing where they should have been displayed.

We updated this to use a more reliable way to identify and match the correct charge information. Table grouping works as expected if groups are enabled.

Deactivated/deleted setup menu tasks still being added to work orders [00151414]

When users created a work order, the system was adding an inactive task to the work order.

We corrected this so inactive tasks will no longer be automatically added when creating a new work order. However, for In Progress and Completed work orders, inactive tasks will remain visible for reference.