



Managely 5.3.8 Release Notes

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MANAGELY™

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Enhancements

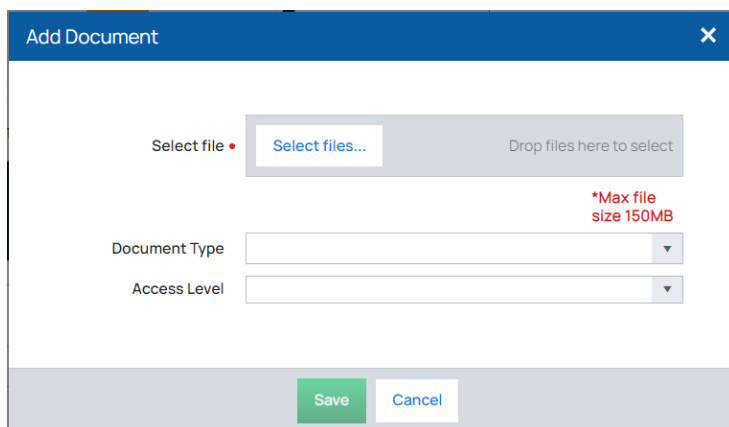
Managely Essentials Document Security Field

For the Managely Essentials license type, users can edit the Security field on documents (Customers > Documents tab).

- If a user specifies 'Internal' security level for any documents on a customer, the documents do not display in the documents area of the customer portal.
- If a user specifies 'Customer' security level for any documents on a customer, the documents do display in the documents area of the customer portal.

Increase Document Upload Size

The maximum document upload size has been increased from 5MB to 150MB.



The screenshot shows a dialog box titled "Add Document" with a close button (X) in the top right corner. The main content area includes a file selection section with a "Select file" label, a "Select files..." button, and a "Drop files here to select" instruction. Below this is a red asterisk note: "*Max file size 150MB". There are two dropdown menus: "Document Type" and "Access Level". At the bottom of the dialog are "Save" and "Cancel" buttons.

Application Corrections

Resolved Issues

Wrong site being displayed on customer

Resolved an issue with wrong site information displayed when switching customers.

Add Proposal Defaults Correction

When adding a new proposal, the following fields have defaults:

- Status - This is 'New' when creating a new proposal
- Sales Tax - This field uses the sales tax that is associated with the site attached to the proposal

Resolved Issues

- Service Level - This field uses the service level associated with the selected site or system for the proposal. A system's service level takes priority over the site if both are selected

Default memo is not being set on invoices

Resolved an issue with the default memo so it is now being set from the system defaults (Setup > Company > System Defaults) for manual invoices.

RMR Grid not taking into effect UTC Dates

Resolved this issue so that all median dates load in UTC time.

Export to Excel Only Exporting Displayed Page

Resolved this issue so that when using the export to Excel feature, all records are exported (instead of only the first page of records).

Proposal Form Signature Box error

Resolved an issue with eForms so that the resulting PDF file completes properly without error.

Issue in WO appointment length

Resolved an issue with the appointment Length (minutes) showing zero instead of the correct length.