Managely 5.3.8 Release Notes

November 2022

MANAGELY™
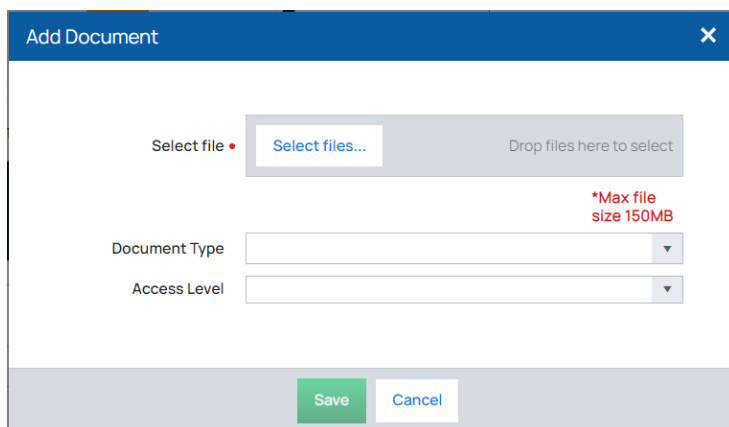
Contents

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.

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.