Managely Release Notes

June 2025

Version 5.3.49

Contents

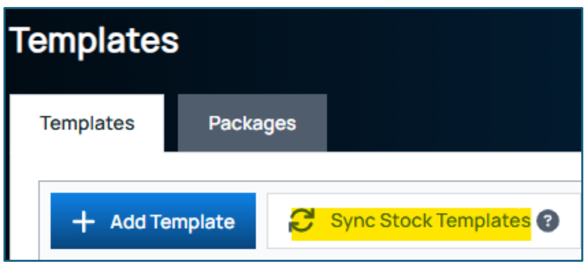
Enhancements

Templates & Forms

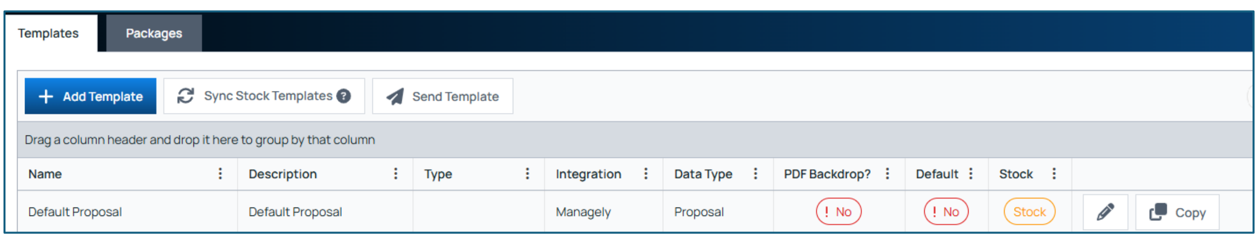
eForms: Major Changes to Default Proposal [00138081]

There was an issue caused by the previous version using the proposal report designer template, which is different than the current default proposal template as defined under Templates & Forms (template engine).

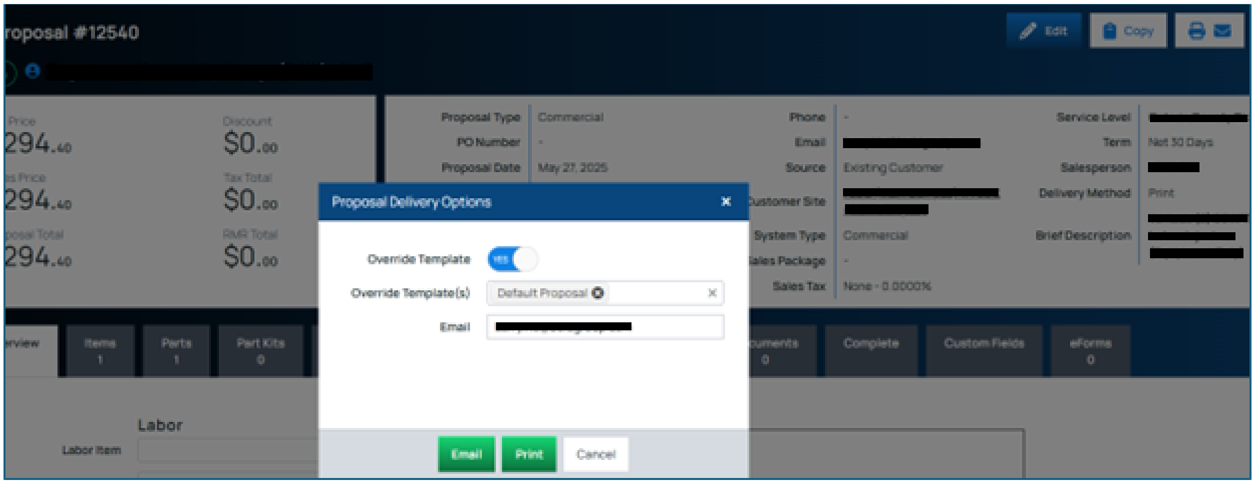
First, users should Sync Stock Templates (Templates & Forms > Templates):



Set the stock proposal template as the default (or create a copy of it and use that as the designed default):



When printing a proposal, select the default proposal template (for new proposals that have not been printed before, it should use the default automatically):



The resulting PDF file shows the correctly formatted fields:

1. Proposal Date now shows Month name Day, Year.
2. Both the header and footer boxes are bolded, and the text under the label is centered.
3. Contact Information and Brief Description now have a grey background, smaller/un-bolded like the previous template.
4. Charges/Notes table now extends all the way to the right.
5. Sales phone number is now formatted correctly.

Accounts Receivable

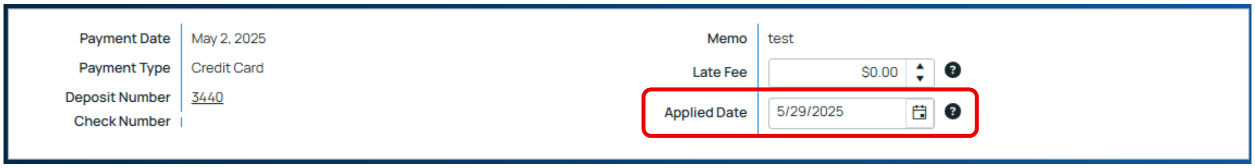
New Applied Date Field [115771]

We added a date field (called **Applied Date**) so users can select a credit/payment application date (instead of defaulting to the current date when entering these) This helps users properly document when the credits and payments should be applied and helps bring more accurate accounting reporting.

Users can see the new **Applied Date** field on the Apply Payment page. Users can arrive at this page through a couple of ways:

- Accounts Receivable > Payments > Deposits > Batch # > (Deposit) # > Apply button
- CRM > Customers > Payments tab > $ Apply button in a grid row.

The **Applied Date** field defaults to the current date, and users can change the date to any valid date.



For GL Entry integration, the applied date is used as the entry date for all GL entries related to the applied payment.

For credits, the applied date follows the same behavior as payments; the field defaults to the current date and users can change the date to any valid date.

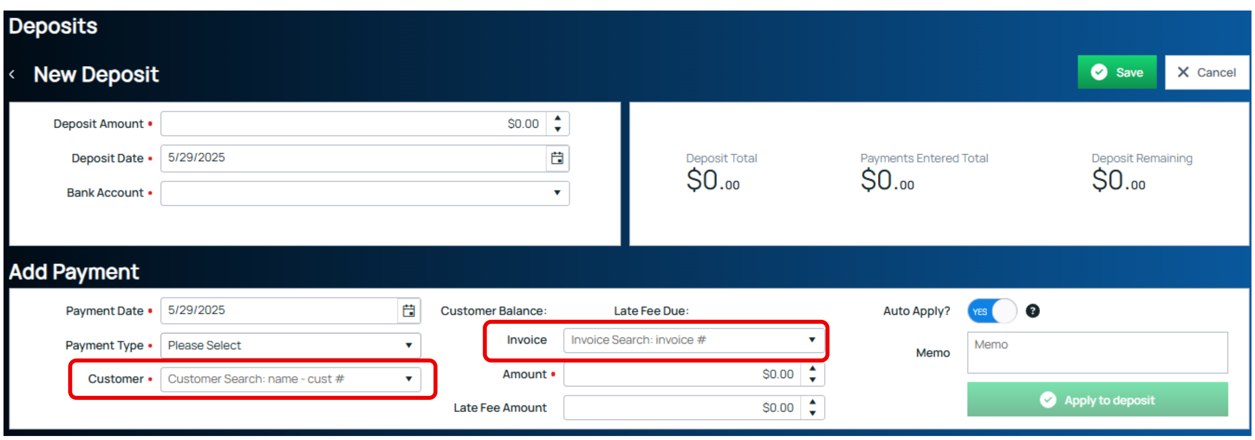
There is a confirmation message if users enter an applied date outside the open accounting period.

Deposit Page Invoice Search and Customer Auto-Fill Functionality [00135274]

We changed the behavior of two fields on the Deposit page to improve usability:

Invoice field: Enabled invoice search functionality. This allows users to search for an invoice number without requiring them to select a customer first.

Customer field: This automatically populates when selecting an invoice.

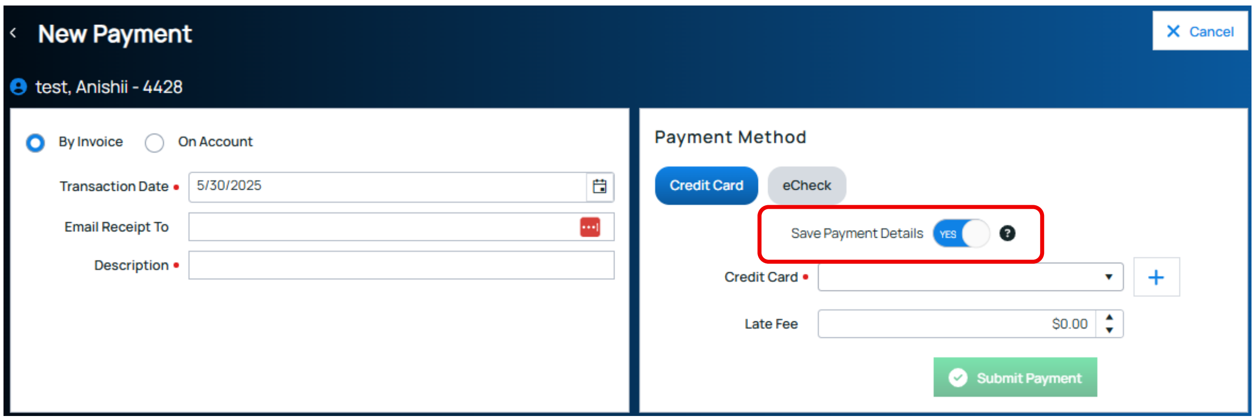


New One-Time Credit Card Payment Option [00123770]

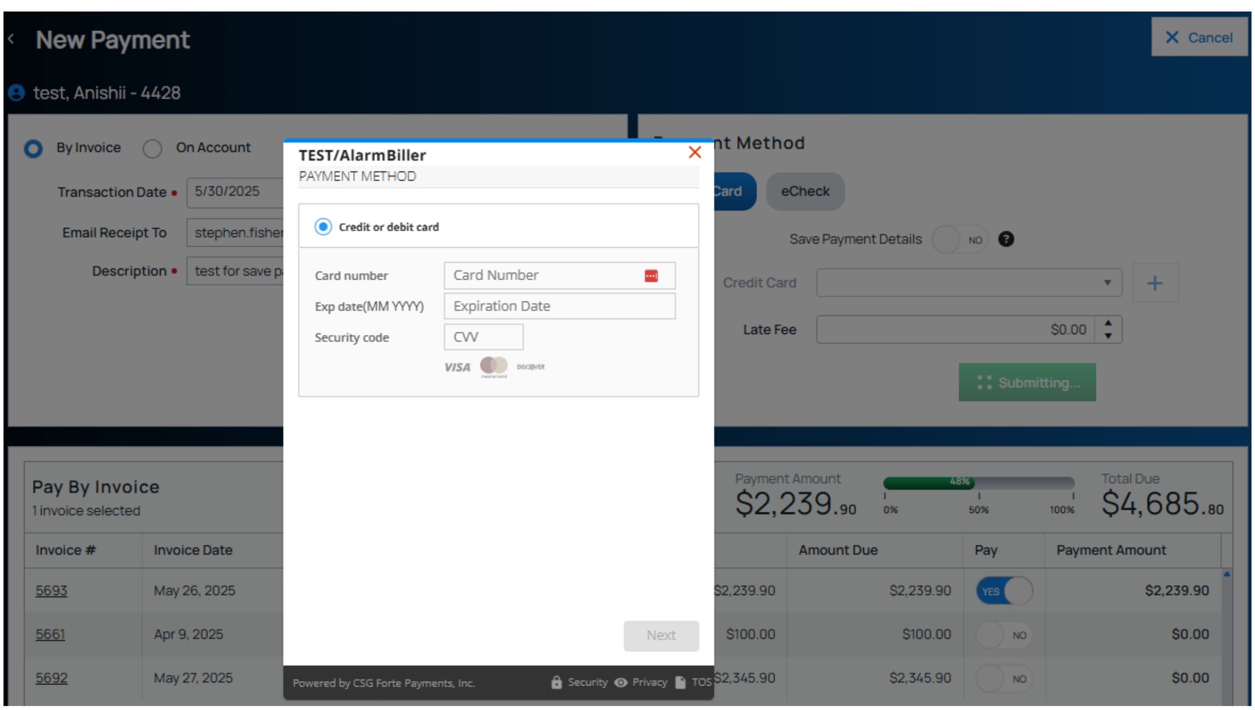
A dealer requested an option to use one-time credit cards without having to save the credit cards on file for their customers. Over time, this would keep them from having many credit cards on file for these accounts.

We added an option for one-time use credit cards when creating transactions and for customer portal users to use when paying an invoice.

Users can see this on the New Payment page (Accounts Receivable > Invoices > Pay Invoice button in the grid). This is the **Save Payment Details** switch:



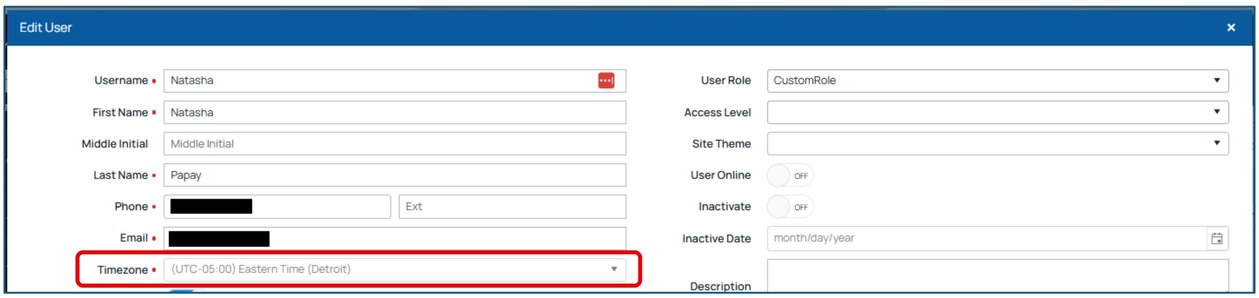
By default, this is set to YES, which means that credit card details will be saved as usual. Setting this to NO will prevent the existing credit card/eCheck information from being selected by disabling the **Credit Card** field. When clicking the **Submit Payment** button, a new window opens and the entered credit card information will be submitted without saving it for the selected invoice amount.



Setup

Disabled User Time zone Dropdown

When a user is assigned a custom role on the User Edit page (Setup > Company > User Manager > User details) that was created on the Custom User Roles tab, the time zone dropdown will now be disabled. The time zone is determined by the custom role itself.



System

Calendar GraphQL Now Includes Appointment Breaks

The GraphQL request getcalendar did not include the acalendarbreak with the payload. We added logic to pass along the break in the appointmentBreaksEditorViewModel.

Application Corrections

Managely part journal is flagging issues as belonging to yesterday's date [00079125]

When adding a part to a work order, Managely issued the part from inventory, but dated that issue for the previous day.

We changed the entry date format so that it will not convert to local date/time.

Licensing Issue: 6 Managely user licenses: when trying to edit a user, get an error message that user count exceeded (but it isn't) [118888]

We resolved an issue that caused an error about exceeding user count.

GL Posting report [00131492]

The GL Posting Report would not load and gave an error. We resolved this by improving the query for the data.

Enhancement of ability to select multiple sections around the page at once

Users designing eForm templates needed the ability to select multiple sections so that when moving one, the entire group moved together.

We implemented functionality that allows users to select and deselect multiple elements using the Ctrl or Shift key. Additionally, the selected elements can be dragged and dropped collectively while holding either of these keys, ensuring seamless multi-selection and repositioning within the form designer. This improves user interaction by supporting intuitive multi-element manipulation.

Deposit date is different from deposit date on GL posting report [00134178]

The Accounts Receivable > Payments > Deposits> Show Reconciled Deposits toggle = YES. A deposit showed with one date while the GL Posting Report showed the deposit with a different date.

The deposit had the correct date in the database if the deposit was created when the dealer's local time was the same as the UTC date. There were issues after the deposit was created with the date picker on various pages showing the wrong date. It tried to convert a date/time from UTC to a local time zone, which could show the wrong date. We eliminated this offset for date only fields in a date picker field in these forms and grids: Edit Deposit form; Edit Deposit Payment form; Add Deposit form; Deposit Payments grid; and Deposit Payment details.

Statements do not include late fees on the PDFs (they appeared on customers' accounts) [134740]

Statements did not include late fees and statements were sent to all customers when the software was instructed to only send one statement.

When a user chooses Select All, the system filters and processes the current views. The relevant data is then compiled and delivered. This ensures the user receives all necessary information based on their selection.

Warranty Start Date changing by a day when the site is saved [00135086]

We fixed an issue where the Warranty Start Date was changing by a day when the site was saved.

Cannot drill down into GL accounts from a report [00135666]

When trying to link to a GL account from a Profit and Loss Report, users received an error about a missing column error.

This was due to the addition of the Customer Name and Customer # columns to the GL account grid. We fixed this issue so that users will not receive an error.

Sites are not showing on our largest customer [136947]

We updated the customer sites grid to correctly page as it was only pulling down the top 100 sites for a customer.

Text in form designer not displaying properly [136653]

When entering text in a text box, it did not move a word that does not fit to the next line. It broke it up, no matter how a user aligned it.

We resolved the text wrapping issue by preventing word breaks in the text input field.

eForms: can't add or edit stages [00137707]

In a proposal, users attempted to send a template. When going to stages and adding or editing any information and clicking save, the template reverted. Also, in preview mode for assigning fields the alignment did not match.

We resolved this issue by reverting a change we made in a previous release.