Managely Release Notes

June 2025

Version 5.3.50

Contents

Enhancements

Templates & Forms > Templates

Added RMR to Proposal Stock Template [00138644]

Users sent a proposal to an existing customer with the RMR price as part of the quote, but it did not show up on the proposal.

To resolve this, we updated the proposal stock template to include the RMR table and the total monthly and cycle amounts. These changes will be available after clicking the **Sync Stock Templates** button on the Templates page (Templates & Forms > Templates).

The Recurring Services Added table showing the RMRs was added between the Charges table and the Notes table. The Total Recurring Services display the total monthly and cycle amounts:

Charges

Description	QTY	Rate	Amount
test pk desc	1.00	$150.00	$150.00
test camera part	1.00	$75.00	$75.00
		Total Charges:	$225.00
		Sales Tax:	$18.00
		Grand Total:	$243.00

Recurring Services Added

Description	Activation Date	Next Invoice Date	Billing Cycle	Monthly Amount	Cycle Amount
Monitoring Services	06/09/2025	06/01/2025	Monthly	$7.00	$7.00
Monitoring Services	06/09/2025	06/01/2025	Quarterly	$10.00	$30.00
		Total Recurring Services:		$17.00	$37.00

Notes

Note	Modified Date	User

CONTACT US

Billing Questions	Sales	Central Station	Service	Email
[redacted]				[redacted]

To pay online, please visit: [redacted] | Registration Key: [redacted]

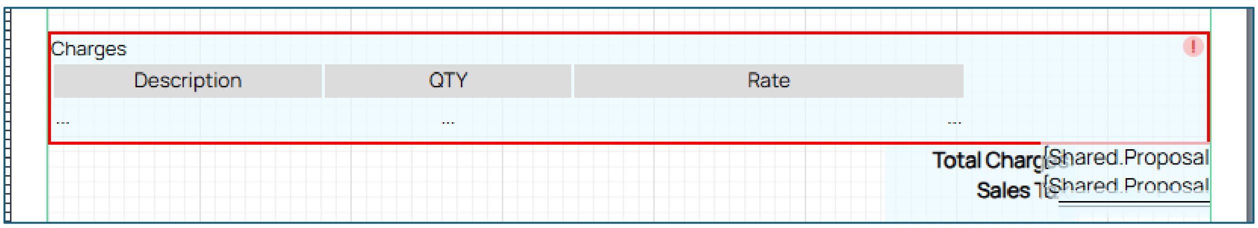
Make Full Width Function Updated [00138002]

The **Make Full Width** button on a table element was upgraded from just expanding the width of the table, if it is less than the full width of the page, to also extending the last column to the edge of the table, all at once.

Note: This only works when the total width of the selected columns is less than the page width. If a table is hiding columns because they exceed the width of the page, thus appearing less than full size, the button will not expand the last visible column that fits into the page.

Overflowing columns need to be addressed separately by reducing their size using the column editor.

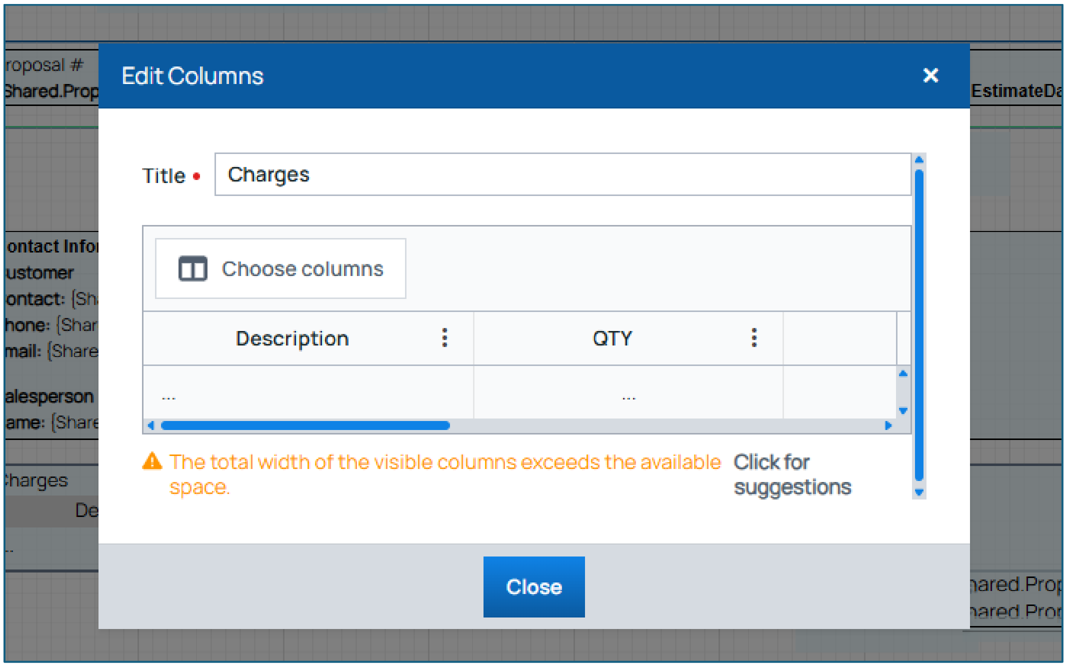
For example: This is what a table with overflowing columns might look like:



It appears as if the Rate column should stretch to the end, but the Amount column is the last selected column, which is overflowing outside the boundaries of the page, and removed from the designer to closely resemble the printed version. These steps show how to fix this:

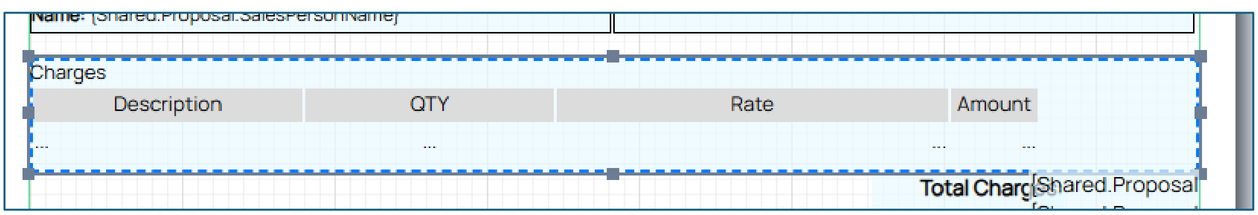
1. Select the table and click the **Edit Columns** button.

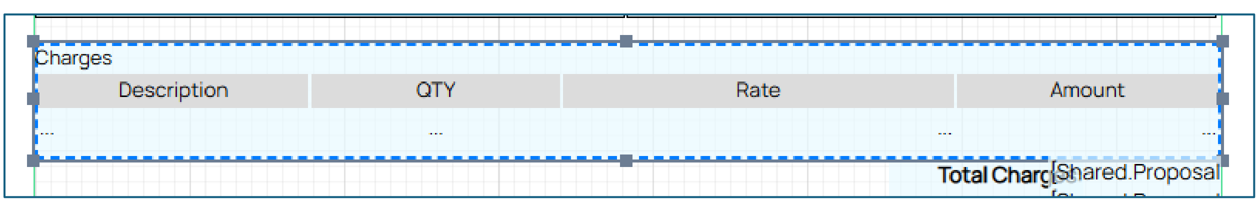
2. There is a warning message indicating the total width exceeds the available space:



3. Scroll completely to the right and drag the right edge of the Amount column to the left to reduce it.
4. When the warning message is gone, the table correctly fits inside the page.
5. Close the column editor.

If the columns do not fill the full width of the page, the **Make Full** button will now expand the last column:





Clicking Sender Editable Fields on Forms (AlarmBiller Parity) [00136950]

Before sending a form, users wanted to be able to click on the fields that are editable by the sender to complete (for AlarmBiller product parity).

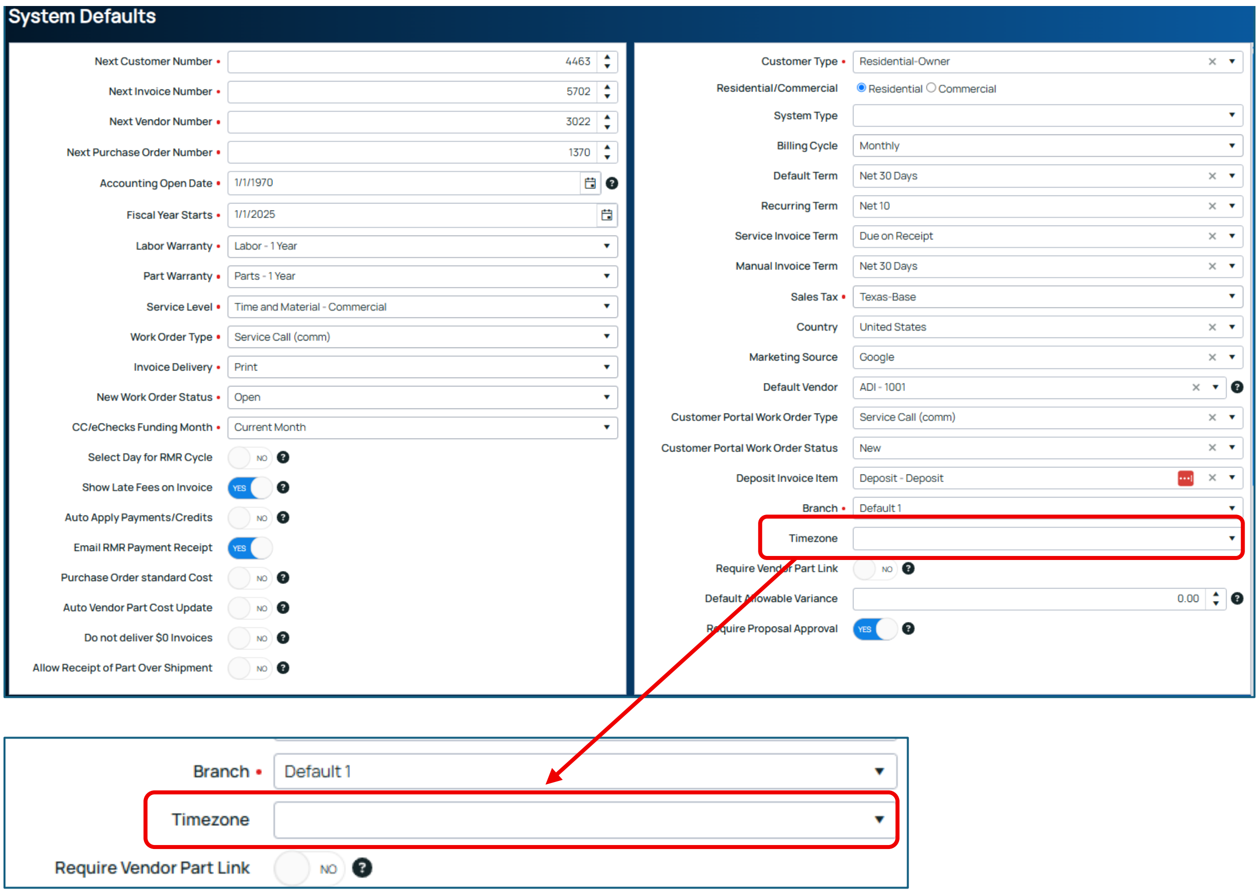
We implemented the ability to click on radio buttons and checkboxes directly to turn them on or off. In addition, we addressed a few other issues:

- When hovering over an element in the designer that has an assignable field in the menu on the right, a tooltip displays the corresponding element name from the Assignable Field menu. We added this feature to these element types:
  - Checkbox
  - Radio button
  - Initials
  - Mapped field
  - Signature
- When a mapped field is used, the corresponding assignment element in the menu would display an empty box and not the field name. This has been fixed.
- Some styles were adjusted to create padding and spacing between elements in the assignment menu.

Setup > Company

Default Time Zone [00134410]

On the System Defaults page (Setup > Company > System Defaults), we added a **Timezone** field.



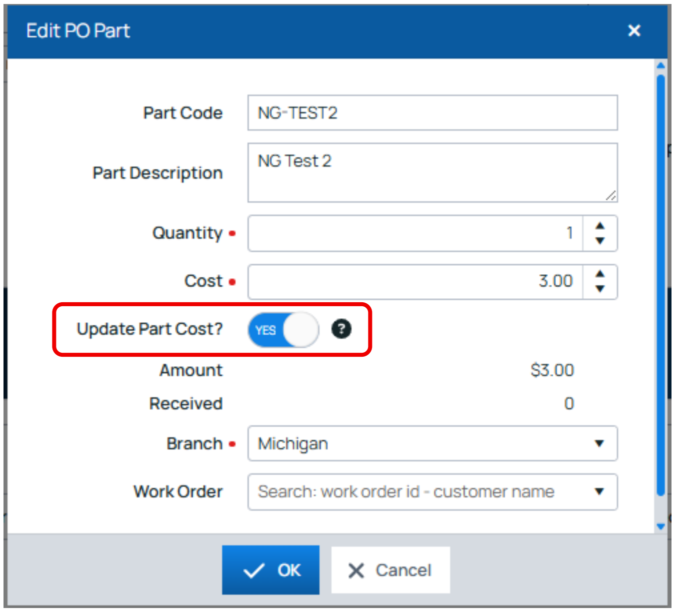
The time zone in this field will be the default used when creating customers. When creating customer sites, the customer site time zone will default from the customer. If the customer is missing the time zone, the customer site will use the time zone from the System Defaults page.

Accounts Payable > Purchase Orders

New Option to Permanently Change Part Cost When Editing Cost on Purchase Order [00123652]

There is a new option for users to update the part cost when they edit the cost on a purchase order. This can save time opening the part setup and changing the price after resolving the purchase order.

Users can see this new option called **Update Part Cost?** on the Edit PO Part form (Accounts Payable > Purchase Orders > Purchase Order Detail > New Purchase Order or Edit purchase order > Parts tab > Edit part):



To be able to set the **Update Part Cost** switch to YES, the vendor on the purchase order must be the vendor associated with the part.

Setting this to YES will update the vendor part cost so future purchase orders will use the updated part cost instead of the cost from the inventory part. This changes the purchase order cost without changing the inventory cost. This does not affect the standard cost of the part. Managely creates purchase price variances (PPV) for cost differences.

Users can see the part cost on the part (Inventory > Parts > part detail) and can see the vendor cost on the part Vendor tab (Inventory > Parts > part detail > Vendor tab) in the Vendor Cost column. The Cost on the part and the Vendor Cost can be different. If users want these to be the same, they need to edit the part and change the **Cost** field or update the part cost on the next purchase order to match the part cost in inventory.

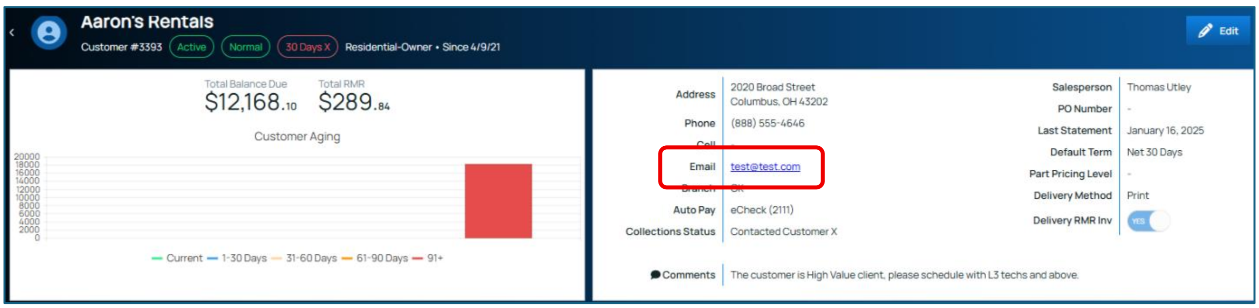
By default, the **Update Part Cost** switch is NO.

Note: On the System Defaults page (Setup > Company > System Defaults), there is an existing switch called Auto Vendor Part Cost Update. This will enable updating the part cost for all parts regardless of the switch Update Part Cost? on the Edit PO Part form.

CRM > Customers

Email Address on Customer Detail Page is now a Hyperlink [00135155]

The email address on the customer detail page is now a hyperlink. When a user clicks it, the user's default email program opens.



For users familiar with the AlarmBiller product, this now functions the same way as the AlarmBiller product.

Application Corrections

After deleting a receipt you are unable to delete the purchase order [00131072]

After deleting a receipt, users were unable to delete the purchase order.

We implemented the following changes:

1. When a user deletes a purchase order, it is inactivated not deleted.
2. Inactivated purchase orders are displayed in the Purchase Orders grid when a user clicks the **Show all POs** switch.
    a. The Voided column with yes/no appears only when the **Show all POs** switch is YES.
    b. The changes are reflected IN both the Accounts Payable > Purchase Orders grid and in the Accounts Payable > Vendors > Vendor details > Purchase Orders grid.
3. Inactivated purchase orders are not displayed as an option in the PO drop down when creating or editing a bill, receipt, or credit in Accounts Payable.
4. Inactivated (voided) purchase order details cannot be edited. (However, they can be copied.)
5. On the purchase order details page, we moved the purchase order Status from the page to under the purchase order number.
6. Deleted purchase orders show the status text Voided in red under the purchase order number.

7. A work order part that was linked to an inactive direct expense purchase order has its link removed so the purchase order does not display it. If a work order part had two purchase orders and the last one was removed, the work order part switches to displaying the previously created purchase order that is still active.
8. The reserved part ledger entry is adjusted when a direct expense purchase order linked to a work order is deleted.

A reserved part ledger entry is generated when a work order is saved with a part that has a stock flag turned on (the entry is on the work order Part Ledger tab). It indicates how many are committed to be pulled from an associated warehouse (part/work order/default warehouse). Since direct expense purchase order parts are not pulled from a warehouse, the quantity of a purchase order part is subtracted from the reserved part ledger entry quantity (status = Committed).

Salespeople departments are not working properly - a manager in commercial sales cannot see any sales team below him [00132411]

We resolved an issue preventing managers from seeing the sales team below them.

When entering a bill, dates appear correct, but in grid view, bill date is Incorrect [00134936]

Users entered a bill and entered the Bill Date and Due Date. On the Bills page (Accounts Payable > Bills) the bill Due Date column showed a different date and the Due Date on the bill detail page.

We updated the page to convert the due date from UTC correctly, and it will also only use the date when saving, even if there is a time in the due date.

When creating a work order from the calendar the phone and email fields are blank [00135180]

We resolved an issue found when creating a work order from the calendar, the fields needed for the phone and email were not being set.

Bill date is changing and reverting back one day [00135441]

Users entered a bill and entered the Bill Date and Due Date. On the Bills page (Accounts Payable > Bills) the bill Due Date column showed a different date and the Due Date on the bill detail page.

We updated the page to convert the due date from UTC correctly, and it will also only use the date when saving, even if there is a time in the due date.

Bank reconciliation dates [00136452]

This issue was caused by the payment date having a time component that was shifted by the time zone offset to be the incorrect date. The reconciliation for the bank account failed to show the payment because of this date issue.

The date will no longer use the time component and will only store the date in the database (for both the GL Entry and GL entry detail). This will ensure that the reconciliation displays the payments up to the ending date.

It lets you add tracked time to a shift, however there is an error message when saving [00136747]

We resolved the issue causing an error when saving tracked time to a shift.

RMR ran last night but no printed invoice batch appeared [00138784]

Users auto ran RMR for master and regular invoices. They looked at the printed batch history, and there were no printed invoices to download for master or regular customers.

We fixed an issue that prevented RMR runs from creating printed invoices to download.