Managely Release Notes

August 2025

Version 5.3.53

Contents

Enhancements

Important! Branch IDs (a Pro feature) are required in database tables where they were not before, and we are setting branch ID values where they were missing.

Important! We made changes to templates that will require users to Sync Stock templates (Templates & Forms > Templates).

System-wide

Default Branch Based on Indirect Source of Transactions Impacting GL [120486]

Dealers on Managely Pro (and higher) can see branch fields throughout Managely. Dealers on Managely Essentials will not see branch fields.

Branches were not being set in some areas for generated entities, such as in the general ledger, and in some other entities like certain generated invoices. This update makes branches required in all places. The BranchId column in all database tables is non-nullable, and each place that saves data to one of these tables sets a branch ID. Also with this change, when creating a master customer, a branch ID is assigned to the site when it is created.

For setting branches on non-GL records, it depends on where it pulls the branch to assign: if an entity inherits the branch from another, it takes the branch ID from there. For example, a vendor bill inherits from vendors, so we set a vendor's bill branch from the vendor it is associated with. Vendors do not inherit a branch from anywhere, so we are setting a missing vendor branch from the system default.

For GL records, we are setting the branches based on the entity that created the entry, even in entries in closed periods. For GL entries that were created from the parts ledger, if any of those entries are missing a branch ID, we are setting the missing branches from the entity that created parts ledger entry. For example, if an invoice issues parts, the invoice creates a parts ledger entry, and the parts ledger entry creates a GL entry. As the parts ledger entry itself does not have a branch, the branch for the GL entry comes from the invoice.

Default Branch on Entities

On any entities (like customers, site, vendors, etc.) that are missing required branches, we are setting the branch to the system default on the System Defaults page (Setup > Company > System Defaults).

Track User Activity to Prevent Session Timeout [00138714]

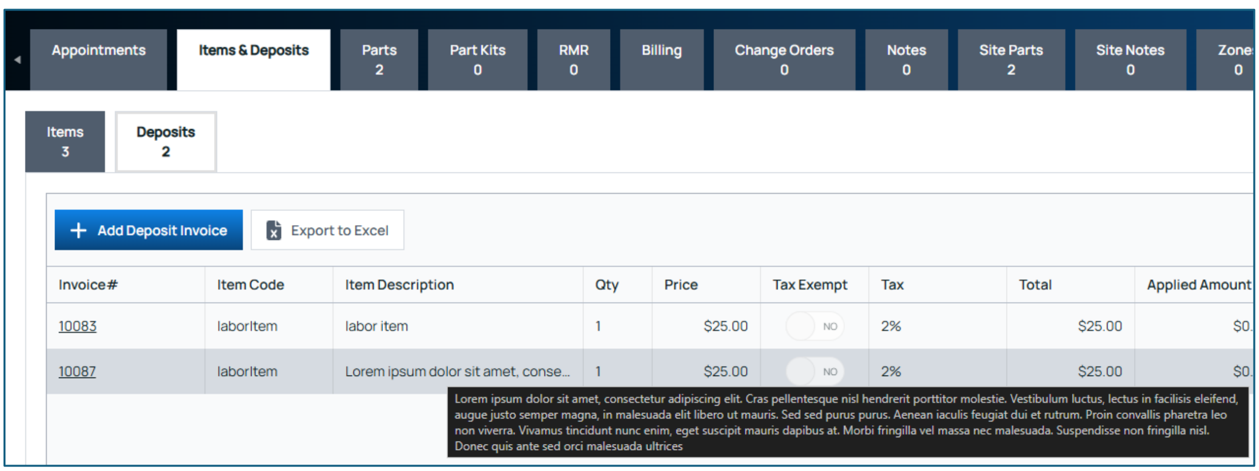
Managely now tracks user activity on the page so that a session does not time out while users are actively working and they can save their data. This activity includes user interaction such as clicks, types, and scrolls with any page.

Customer Search Updated to Accept Hyphens and Commas [00138717]

In the search bar at the top of the Managely application page and the search on the Customers page (CRM > Customers), users can now enter hyphens and commas to search for customer names that include these special characters.

Item Description Column Single Line Viewable with Hover-over

The Item Description grid column will now display the text on one line, with an ellipsis "..." at the end if it is too long. Hovering over the text will display the entire text in a tooltip. For example:



We applied this change to the Description column in these:

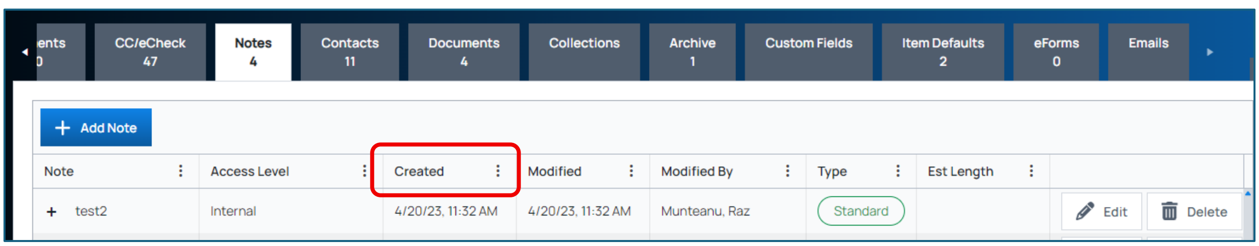
- Setup > Proposals > Packages > Items grid
- CRM > Proposals > Proposal Detail > Items grid
- Accounts Receivable > Invoices > Work Order Invoice Detail > Items grid
- Accounts Receivable > Work Orders > Work Order Detail > Items & Deposits tab > Items tab
- Accounts Receivable > Work Orders > Work Order Detail > Items & Deposits tab > Deposits tab

CRM

Notes Created Date Column [00086689]

On the grid for notes, we added a column for Created. This shows the date the note was created. It is visible on the Notes tab grid on these pages:

- Customer
- Site
- System
- Proposal
- Leads
- Work Order details

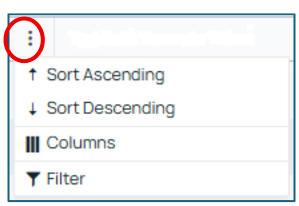


Users can sort ascending and descending and filter the dates in this column.

Accounts Receivable

Added Sorting Ascending and Descending Options [139262]

We added Sort Ascending and Sort Descending to columns on some pages that did not have them. Users can see these sorting options by clicking the kabob menu (three vertical dots) in a column heading:



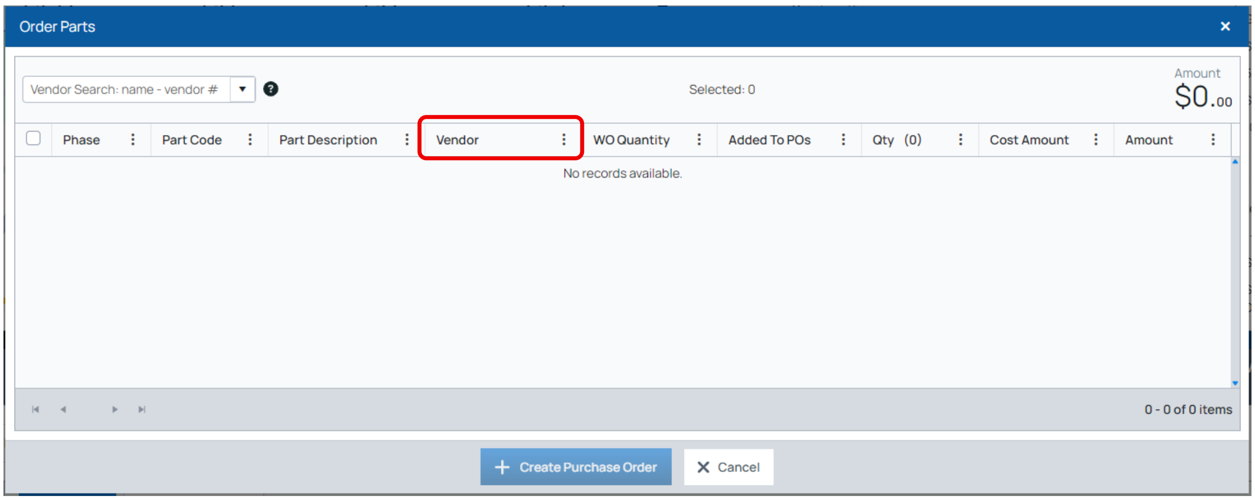
We added this sorting option to these pages:

- Accounts Receivable > Payments > Deposits > + Add Deposits button > New Deposit page
- Accounts Receivable > Payments > Deposits > $ New Payment Batch button > New Payment Batch page

- Accounts Receivable > Payments > Deposits > Batch # link > [payment method] Deposit page
- Accounts Receivable > Work Orders > WO # link > Work Order Detail page > Zones tab
- Setup > Accounting > Sales Tax page > Rates button > Rates page

Added Vendor Column to the Order Parts Screen within a Work Order

On the Order Parts form (Accounts Receivable > Work Orders > WO# hyperlink > Parts tab > Order Parts button), we added the Vendor column to the grid:



The vendor in this column is the **Main Vendor** selected on the Parts detail page (Inventory > Parts > Part Code hyperlink -OR- Setup > Items & Parts > Parts > Part Code hyperlink).

Invoice History Captured when Emailing, Printing, and Mailing Invoices [00136635]

Managely now captures invoice history when an invoice is emailed, printed, and mailed. Users can see this on the Invoice page (Accounts Receivable > Invoices > Invoice # link) by clicking the History button. The history popup can show “Invoice # [invoice number] was emailed”; “Invoice # [invoice number] was printed”; and “Invoice # [invoice number] was mailed”.

Accounts Payable

Add Payment Page Grid now shows Invoices for Vendors with no Default Payment [00137895]

On the Add Payment page (Accounts Payable > Payments > +Pay Bills button), when users select a **Payment** (which is required) the grid will now show invoices for vendors with that **Default Payment** and all vendors who do not have a Default Payment selected. The **Default Payment** is a field on the vendor detail page (Accounts Payable > Vendors) shown in edit mode.

Increased Purchase Order Memo to 1,000 Characters [00138079]

On the purchase order detail page (Accounts Payable > Purchase Orders > + New Purchase Order -OR- PO# link), we increased the character limit on the Memo tab from 250 characters to 1,000 characters.

Setup

Vendor Purchase Items Exportable to Excel [00136087]

On the Items page (Setup > Items & Parts > Items) on the Vendor Purchase Items page, we added the **Export to Excel** button.

Mail/Email Summary Page- Emailed Invoices Include the Invoice Number in the Subject Line [00138250]

On the Mail/Email Summary page (Setup > Utilities > Mail/Email Summary), the subject of the emailed invoices now includes the invoice number, so it is easier for users to find the correct invoice email in the list.

New RMR Bulk Updater [00116672]

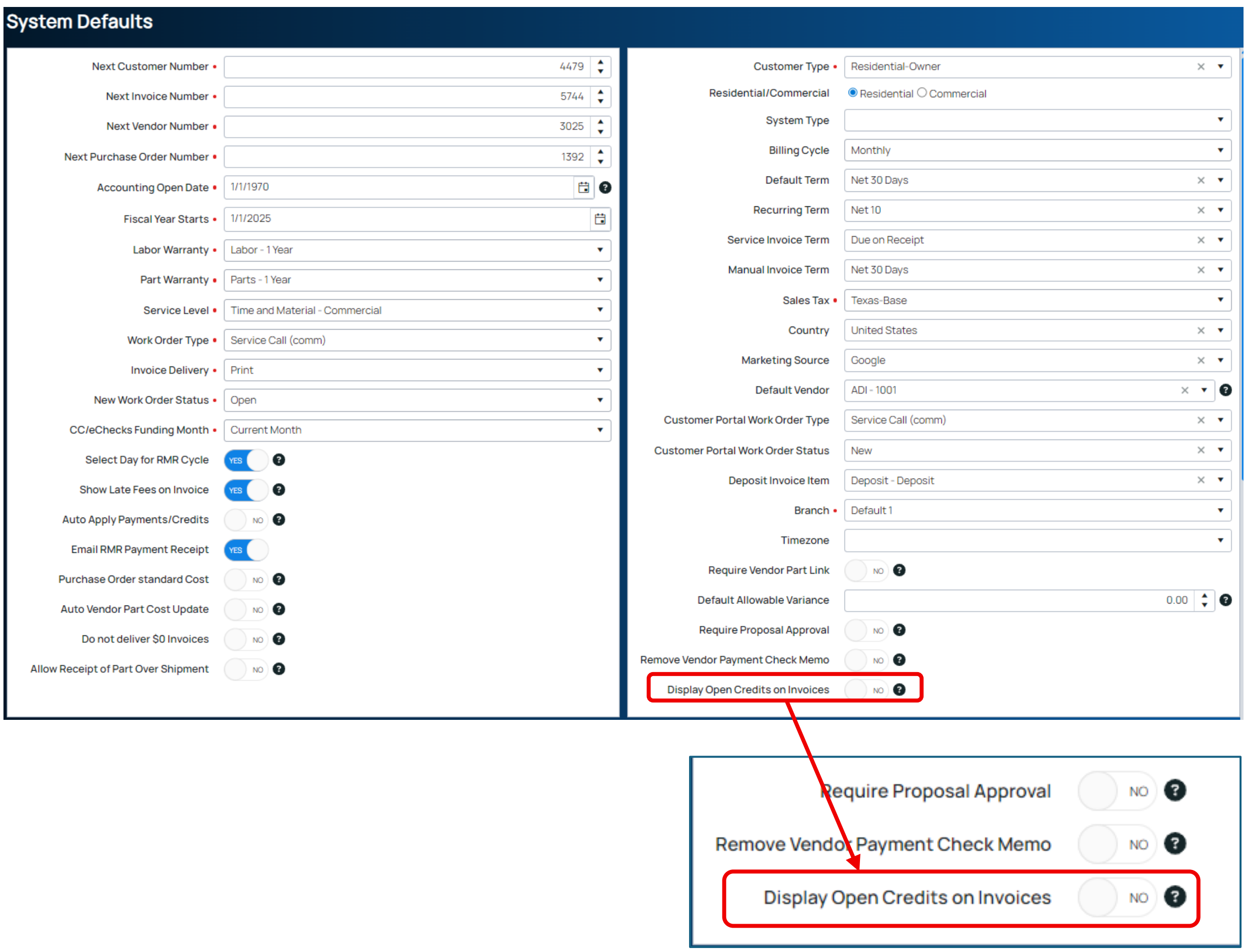
The RMR Bulk Updater is for users who want to update RMR settings for a set of customers.

1. Open the RMR Bulk Updater page (Setup > Uploaders > RMR Bulk Updater).
2. Click Download Template (or Download Template with Data for sample data to see what is needed and how it is formatted.)
3. Add the appropriate data based on your company to the template and save the spreadsheet.
4. On the RMR Bulk Updater page, click Select file and browse to the spreadsheet and select it. The spreadsheet appears under the Select file button.
5. Click the Upload button.
6. At the confirmation message, click Yes to overwrite existing RMR data. There is a background job notification and a percentage bar showing progress.
7. When the job is finished, open the RMR page (Accounts Receivable > RMR) and RMR detail pages to see the changes.

Displaying Open Credits on Invoices [00102385]

In previous versions, customers could only see open invoices when receiving their account statements. To improve account reconciliation for customers, we added a feature that displays open credits with the open invoices.

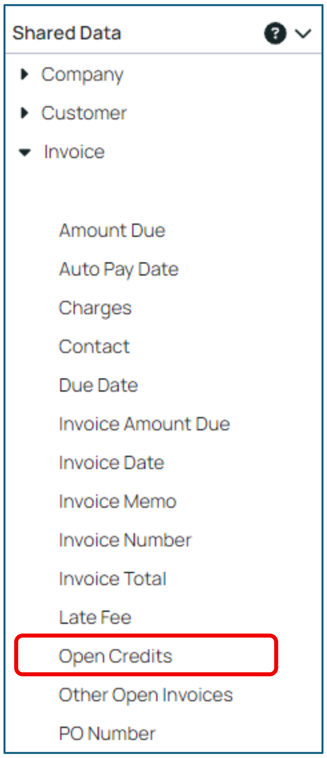
On the System Defaults page (Setup > Company > System Defaults) we added a switch called Display Open Credits on Invoices. By default, this is set to NO. If set to YES, customers can see open credits, if they have been added to the invoice template, along with open invoices.



We updated the invoice template by adding the Open Credits field. To see this on invoice templates, follow these steps:

1. Open the Templates page (Templates & Forms > Templates).
2. Click the Sync Stock Templates button.

3. Open a copy of the default invoice template (click the Design button) or make a copy (click the Copy button) and edit the copy.
4. Under Shared Data > Invoice, find the Open Credits.



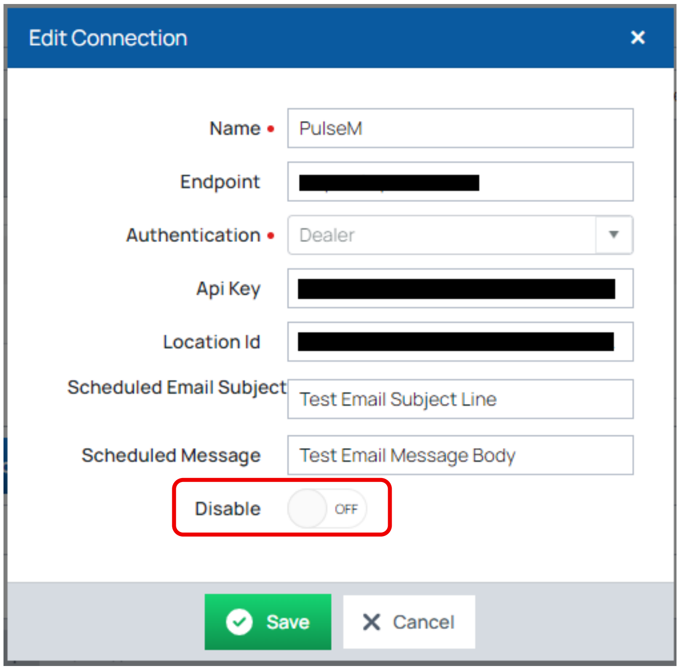
5. Add this to the template and save it.

When using this template for customer invoices, any open credit will be shown.

Note: On the customer detail page, in edit mode, the Show Open Invoices switch should be set to YES or the open credits will be hidden from the invoice calculation when printing invoices for the customer.

Disable External Services

On the Third Party Services page (Setup > Utilities > Third Party Services), we added a switch to disable the external service. When an eternal service is disabled, it will not function and will not appear as an option to be used. Users can set the **Disable** switch to YES to disable a service and set the switch to NO to enable it.



Reports

WIP Report Enhancements

For the WIP Report (Reports > Accounts Receivable > WIP Report) we added these enhancements:

- Added Start Date and End Date range
- Added more sorting options: Project Manager, Category, Job Name (which is the work order description), and Contract Amount
- If a lead is not available, the customer name will be shown instead
- There is a grand total for columns at the end of the report

Application Corrections

Discrepancy between the quantity on the part code and the quantity for that part in a particular warehouse [00126685]

Previously, the warehouse part quantity could be updated directly. However, this was not correct behavior, as the warehouse part quantity should only be updated based on the part ledger entries.

Otherwise, the quantity would quickly get out of sync. Updated behavior drives all quantity updates through the part ledger, thus ensuring that the values stay synchronized.

Issue trying to post bills from vendors [00129242]

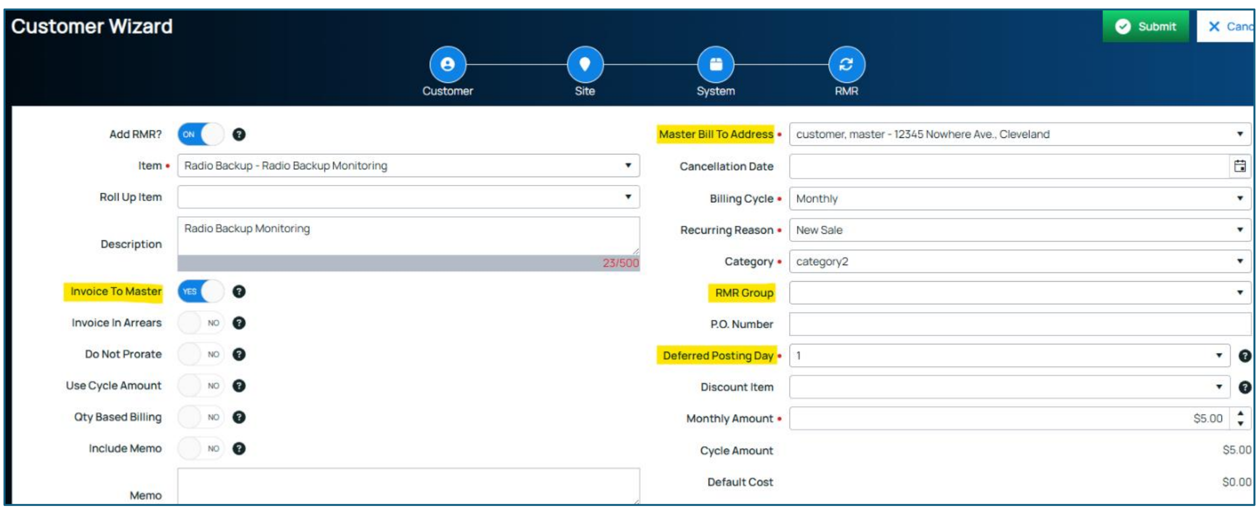
On the Vendor page, the **Default Payment** field (visible in in edit mode), is not a required field. If this field did not have a default selected, then bills for this vendor would not appear on the Add Payment page (Accounts Payable > Payments).

Now, on the Add Payment page, when selecting a **Payment** (which is required) the page will show vendors with that **Default Payment** and all vendors who do not have a Default Payment selected.

When adding a new subaccount to a master and adding RMR, the field to “Invoice to master” is missing [134690]

We resolved this with the following:

The RMR page on the Customer Wizard will include the following highlighted fields (Invoice To Master, Master Bill To Address, RMR Group, and Deferred Posting Day):



Set the **Add RMR?** to ON and then set **Invoice to Master** to YES for the **Master Bill To Address** field to appear. After saving and creating the customer, the RMR is also created and will use the selected master bill to.

If a dealer’s Managely license level is Pro, the **RMR Group** and **Deferred Posting Day** will be displayed and saved to the RMR for the newly created customer. **Note**: If no master customer was selected (under the first Customer screen), the Invoice to Master field and Master Bill To field will not be displayed.

AP Aging Report as of 3/31/25 is showing bills with bill dates after 3/31/25 [135448]

We fixed the AP Aging Report to correctly show bills based on the **As of** date.

Unable to generate recurring WO from prior to 2025 [00138044]

When attempting to generate a recurring work order from prior to 2025, an error showed along with a success notification. When looking the list of recurring work orders, the work order that was supposed to be generated was still in the list with the same Next Occurrence date.

We were tracking an entity for update in the database by mistake, which generated the tracking error. We corrected that and resolved the error.

Inconsistent phone number formatting/display throughout platform [00137912]

When entering a phone number into a form field, for example when creating a proposal, the phone number appeared as formatted, like so: (123) 456-7890. When the same field was displayed on the PDF file, it was unformatted, like so: 1234567890.

We fixed the phone number formatting for the invoices grid, the vendors grid, the proposal details page, and the work order PDF file generation.

UPS takes users straight to the tracking but FedEx takes users to the page to enter the tracking number [138147]

When clicking on the tracking number for courier FedEx, the link now navigates to the FedEx tracking number page.

Trying to filter by printed invoices- and delivery status is giving me dates not able to filter by delivery status [00138842]

We resolved the Delivery Status filter issue on the invoices grid.

Customer site names no longer alphabetized on work order creation [00138836]

Site names in dropdowns are now alphabetized on the New Work Order popup; Create Proposal popup; Create Proposal page; and New RMR form.

Proposal date VS proposal date on printed copy [139134]

When a proposal was copied, the proposal date showed up as one day prior to the day of copying. However, when printed, the correct proposal date appeared.

We resolved the proposal date issue where the proposal date displayed one day prior to the date of copying.

Master customer when searching is showing a site [139378]

We fixed this so Managely no longer gets a master customer site in the quick search.

Parts not showing as received on PO [00139061, 139704]

After receiving parts on a purchase order through a receipt, the parts did not show as received on the purchase order.

We fixed this issue. To get the received count for parts on purchase orders, we added a check for the received parts when mapping the receipts to the purchase orders.

Reformat all stock templates for consistency

All stock templates needed to have the same formatting applied to textboxes, font size, padding, and anything that did not look consistent.

The formats for the invoice, work order, credit, and some parts of proposal now have a more consistent and cleaner look.

Note: To apply the changes, users need to click the Sync Stock Templates button (Templates & Forms > Templates). This change only applies to stock templates and new copies made from them and does not change existing templates.

Unable to create a workorder from a proposal when they add more than one system to the proposal [00140242]

The root cause is a database context issue triggered when saving the proposal and attempting to create a work order. We resolved this issue.

Time stamp on notes [00138336]

The time stamp on notes added to proposals was not in the correct time zone.

The system was converting the Notes' Modified Date twice. We fixed this so the date is only converted once, from UTC (as stored in the DB) to the user's local time.

Invoices that were voided are displaying as open on the customer portal [00141688]

Voided Invoices displayed as open on the customer portal.

We are now filtering out inactive invoices.

Full Vendor menu is not present when copying from a purchase order [00141782]

When attempting to copy a voided purchase order, the vendor selection dropdown was not populating with the complete list of available vendors. This prevented users from selecting the intended vendor for the new purchase order, rendering the copy functionality unusable unless the target vendor was one of the limited options presented.

We fixed the vendor dropdown list issue when copying from a purchase order.