



Managely Release Notes

March 2025

Version 5.3.45.12

MANAGELY[®]

Application Corrections

Templates: “Select Data to Preview” screen is not showing data/drop down options [130205]

The Select Data to Preview popup was not showing data or drop down options.

We added the preview dropdown options for Invoice, Work Order, and Credit type templates so the Select Data to Preview popup shows them. (Other types like Customer, Proposal, site/system already showed the dropdown correctly.)

Adding part results in error msg [130507]

For one warehouse, users could not edit the physical inventory record that they created. The page would show the loading spinner and eventually display an error.

We fixed this issue and improved the loading time for the parts.

Uploaded documents security level issue [130722]

Documents uploaded to a customer’s page with a security level of “Internal” were changing to a security level of “customer” once saved.

This issue occurred on dealers with an Essentials license. We fixed this issue so that when adding a document to a customer, and selecting the Internal security level, the security level is properly saved.

Break mins not showing in WO on appt. [131513]

For work order appointments, the break minutes were not shown on the appointments.

We fixed this so the breaks show on appointments.

G/L entries are incorrect when a refund check is issued to a customer [131628]

If issuing a refund check to a customer, the G/L entries were incorrect. Instead of debiting the Unapplied Cash account, Managely was debiting the Unapplied Deposits account. This created an invalid Balance Sheet.

We resolved this issue, so when a refund check is created (via Customer > Payments > Issue Refund), the unapplied cash GL account will be debited instead of the unapplied deposit. The unapplied cash account is set under Setup > Preferences > GL Account.