



# Managely Release Notes

November 2025

Version 5.3.57

## MANAGELY®

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## Enhancements

### Accounts Receivable

#### Added History to the Deposit Page [133411]

On the Deposits page (Accounts Receivable > Payments > Deposits > Batch # hyperlink), we added a History button:



Clicking this opens a popup window showing the deposit history:

| Tracking History for Deposit: 3479 |        |                     |                |                     |
|------------------------------------|--------|---------------------|----------------|---------------------|
|                                    | Action | Message             | User           | Date                |
| +                                  | Update | Deposit was Updated | Utlely, Thomas | 9/9/2025 3:37:02 PM |
| +                                  | Update | Deposit was Updated | Scalia, T.L.   | 9/9/2025 8:07:31 AM |
| +                                  | Add    | Deposit was Added   | Scalia, T.L.   | 9/9/2025 8:07:31 AM |

1 - 3 of 3 items Refresh

Clicking the + beside a row shows additional details:

|   |        |                     |                |                     |
|---|--------|---------------------|----------------|---------------------|
| - | Update | Deposit was Updated | Utlely, Thomas | 9/9/2025 3:37:02 PM |
|   | Action | Description         | Old Value      | New Value           |
|   | Update | Deposit Amount      | 60.95          | 61.95               |
|   | Update | Number of Payments  | 1              | 2                   |
|   | Update | Batch Amount        | 60.95          | 61.95               |

## Appointment Hours Breakdown on Work Orders [144734]

We added a way for users to quickly see the current technician hours spent on a work order. On the work order appointments grid (Accounts Receivable > Work Orders > WO# hyperlink > Appointments tab) we added the **Overview** button:

| Appointments                                                                                                                                                                                                                | Items & Deposits | Parts<br>0       | Part Kits<br>0 | RMR<br>0       | Billing | Notes<br>0 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------------|----------------|----------------|---------|------------|
| <div>  Overview            Export to Excel         </div> |                  |                  |                |                |         |            |
| Appt #                                                                                                                                                                                                                      | Appointment Time | Last Activity    | Status         | Technician     |         |            |
| 11066                                                                                                                                                                                                                       | 9/30/25, 1:00 PM | 9/30/25, 3:00 PM | ✓ Completed    | Kathy Ackerman |         |            |

Click the Overview button to open a popup window:

Appointments Overview



Kathy Ackerman

|            |        |
|------------|--------|
| Dispatched | 1h 35m |
| Working    | 2h 24m |

|            |        |
|------------|--------|
| Dispatched | 1h 35m |
| Working    | 2h 24m |
| TOTAL      | 3h 59m |

This shows a breakdown of appointments per technician.

**Dispatched:** This is determined by these —

- On an appointment, if the Dispatch Time and Arrival Time are set for an appointment, then this is the time difference between the appointment dispatch time and the arrival time for all appointments for the technician in hours and minutes.
- If a dispatch time or arrival time is not set for an appointment, then the appointment is not used in the calculation of a dispatch time for the technician.
- If a technician's appointment is scheduled (the dispatch time is not set), then **Dispatched** shows N/A.

**Working:** This is determined by these —

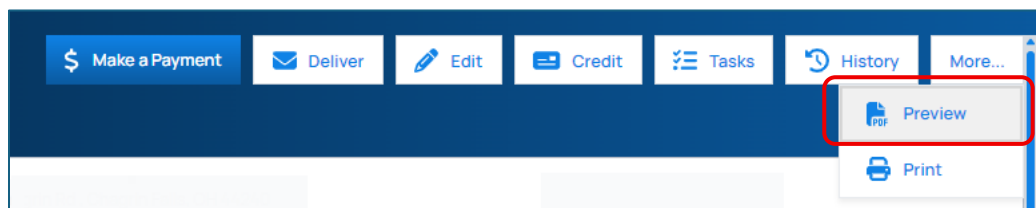
- On an appointment, if both the Arrival Time and Completed Time are set, then this is the difference between the appointment completed time and the arrival time for all appointments for the technician in hours and minutes.
- If the completed time or arrival time is not set for an appointment, then that appointment is not used in the calculation of the working time for the technician.
- If the technician does not have a completed time in any appointments, then **Working** shows N/A.

Below the breakdown per technician, there is a section displaying a summary:

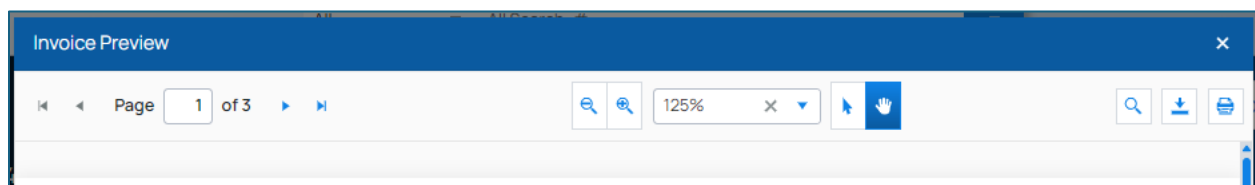
- **Dispatched:** This is the sum of the dispatched for all technicians in hours and minutes. It shows N/A if all dispatched values are N/A.
- **Working:** This is the sum of working for all technicians in hours and minutes. It shows N/A if all working values are N/A.
- **Total:** This is the sum of dispatched and working for all technicians. It shows N/A if both Dispatched and Working are N/A.

## Invoice Print Preview [00135497]

We added a way to preview invoices without downloading them. This is a PDF layout of the invoice. To see this, navigate to an invoice detail page (Accounts Receivable > Invoices > Invoice # hyperlink). Click the More button and click Preview.



Users can scroll up and down the page of the invoice and use the toolbar at the top of the window to navigate through the pages; increase or decrease the zoom; choose a select tool or pan tool (to move around on the preview page); search; download; and print.

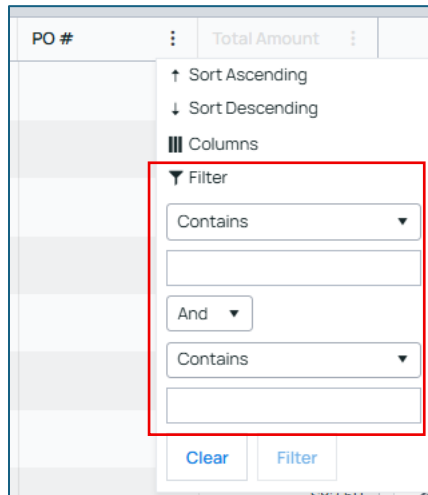


In the preview window, if users click the download or print button, the invoice is marked as printed.



### Improved Work Order PO Filter Search Parameters [146608]

When users add the PO# column to work order grids, they can now filter the column by the “contains” option.



This change applies to these work order grids:

- Account Receivable > Work Orders > Open Work Orders tab
- Account Receivable > Work Orders > Closed Work Orders tab
- Account Receivable > Work Orders > Ready To bill Work Orders tab
- Account Receivable > Work Orders > Change Orders tab

### Added Columns for Cell Phone and Email [00134905]

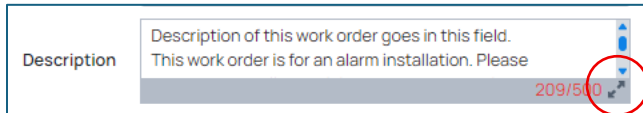
On the Collections page (Accounts Receivable > Collections), we added two columns that users can include in the grid: Cell Phone and Email. By default, these columns are hidden.

To add one or both to the grid, click the kabob menu (three dots) beside a column name in the grid. Click Columns. Scroll down the list to find the columns. Select the checkbox beside the one to add. Click Apply. The columns appear in the grid.

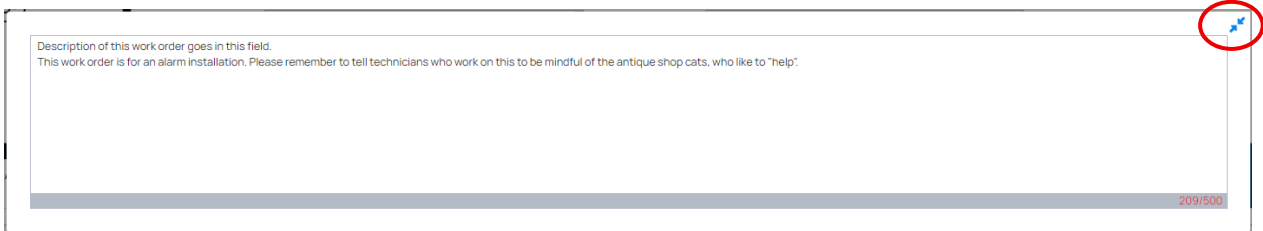
The information in these columns comes from the customer detail record Email field and the Cell Phone field.

## Added Expandable Description in Work Orders [144342]

On the work order detail page (New Work Order —OR— editing an existing work order), we changed the Description field to include an expanding option:



Click this to expand the description to a popup window.



Click the expand option in the upper right to close the expanded window and return to the work order.

We added the expandable description feature to these:

- Editing work orders
- New work orders
- New work orders for the customer portal
- Creating work orders from proposals
- Recurring work orders
- Ready to bill orders

## General Ledger > Bank Accounts

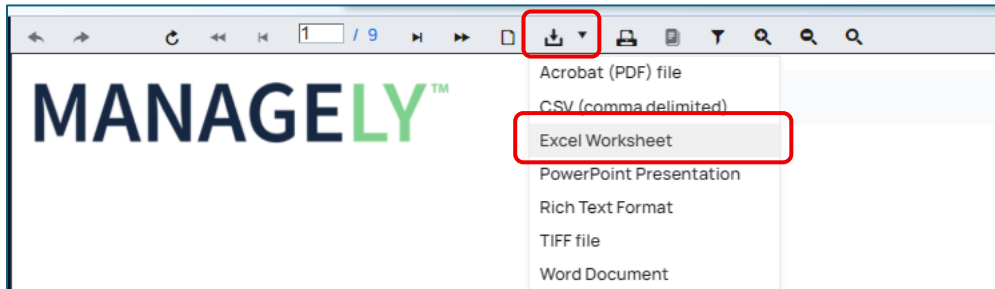
### Added Prompt when Leaving Bank Reconciliation without Saving [145879]

We added a prompt for users working on bank reconciliation that will alert them to save progress if they try to navigate away from the page without saving or clicking Finish Later.

## Reports

### Added Download to Excel to AR Aging Report [147782]

On the AR Aging Report (Reports > Accounts Receivable > AR Aging Report) we added the option to download the report to an Excel Worksheet. This is under the download button on the report toolbar.



## System-wide

### Export to Excel Grouped Rows

Excel export functionality on grouped grids now transfers those groups into the spreadsheets. This applies to all grids that have grouping capability.

For example, this shows the GL Register page with the grid grouped by Account Type:

GL Register + Add General Journal Entry General Journal Entries

Export to Excel no Show All Custom Grid Layout

| Account Number                           | Account Type        | Description                       | Amount            |
|------------------------------------------|---------------------|-----------------------------------|-------------------|
| <b>Account Type: Accounts Payable</b>    |                     |                                   |                   |
| 20500                                    | Accounts Payable    | Accounts Payable                  | (\$11,271,630.84) |
| <b>Account Type: Accounts Receivable</b> |                     |                                   |                   |
| 11000                                    | Accounts Receivable | Accounts Receivable               | \$2,205,130.49    |
| <b>Account Type: Bank Account</b>        |                     |                                   |                   |
| 10200                                    | Bank Account        | Chase CC ****4455                 | \$830.00          |
| 10609                                    | Bank Account        | Fifth Third - Second on same RTG# | \$0.00            |
| 10600                                    | Bank Account        | Fifth Third                       | (\$8,213.40)      |
| 10557                                    | Bank Account        | Testing Dup Rtg Num               | (\$500.00)        |
| 10501                                    | Bank Account        | Chase - Money Market              | \$381.95          |
| 10500                                    | Bank Account        | Chase Money Market                | (\$1,955.00)      |

This shows the grid exported to Excel. The spreadsheet shows the information grouped by Account Type:

|    | A | B                                 | C                   | D                                 | E            |
|----|---|-----------------------------------|---------------------|-----------------------------------|--------------|
| 1  |   | Account Number                    | Account Type        | Description                       | Amount       |
| 2  |   | Account Type: Accounts Payable    |                     |                                   |              |
| 3  |   | 20000                             | Accounts Payable    | Accounts Payable                  | -11271630.84 |
| 4  |   | Account Type: Accounts Receivable |                     |                                   |              |
| 5  |   | 11000                             | Accounts Receivable | Accounts Receivable               | 2205130.49   |
| 6  |   | Account Type: Bank Account        |                     |                                   |              |
| 7  |   | 10700                             | Bank Account        | Chase CC ***4455                  | 830          |
| 8  |   | 10609                             | Bank Account        | Fifth Third - Second on same RTG# | 0            |
| 9  |   | 10600                             | Bank Account        | Fifth-Third                       | -8213.4      |
| 10 |   | 10557                             | Bank Account        | Testing Dup Rtg Num               | -500         |
| 11 |   | 10501                             | Bank Account        | Chase - Money Market              | 381.95       |
| 12 |   | 10500                             | Bank Account        | Chase Money Market                | -1955        |
| 13 |   | 10401                             | Bank Account        | TD Bank - Money Market            | 0            |
| 14 |   | 10400                             | Bank Account        | TD - Money Market                 | -1475.33     |
| 15 |   | 10301                             | Bank Account        | Huntington - Payroll Account      | 100          |
| 16 |   | 10300                             | Bank Account        | Payroll Account                   | 40           |
| 17 |   | 10200                             | Bank Account        | Huntington - Primary Checking - N | 1157.52      |
| 18 |   | 10102                             | Bank Account        | First National Bank               | 484          |
| 19 |   | 10101                             | Bank Account        | Charter One - Primary Checking -  | -7999761083  |
| 20 |   | 10100                             | Bank Account        | Charter One - Primary Checking -  | 13792.5      |
| 21 |   | 1000                              | Bank Account        | Cash in Bank                      | 225.1        |
| 22 |   | Account Type: Cost of Goods Sold  |                     |                                   |              |
| 23 |   | 59000                             | Cost of Goods Sold  | Misc COGS Acct                    | -202.76      |
| 24 |   | 58600                             | Cost of Goods Sold  | Equipment Rental                  | 19.99        |
| 25 |   | 58500                             | Cost of Goods Sold  | Permits                           | 0            |
| 26 |   | 58000                             | Cost of Goods Sold  | Subcontractor                     | 0            |
| 27 |   | 57000                             | Cost of Goods Sold  | Freight on Parts & Equipment      | 134          |
| 28 |   | 55143                             | Cost of Goods Sold  | COGS Three                        | 0            |
| 29 |   | 55142                             | Cost of Goods Sold  | COGS Two                          | 0            |
| 30 |   | 55141                             | Cost of Goods Sold  | COGS One                          | 0            |
| 31 |   | 55120                             | Cost of Goods Sold  | COGS - Service Other              | 30           |

## Application Corrections

### Vendor summary total doesn't match actual amount due to vendor [103534]

The vendor summary total and the actual amount due to the vendor did not match. The summary total was calculating all bills less all payments and this value did not match the total open bills on the vendor.

We resolved this to exclude deleted receipts, bills, and credits from the calculations on the Vendor listing page. This ensures that only active records are considered when displaying open receipt, bill, and credit amounts, resulting in an accurate open balance for each vendor.

### Denied Rejected Credit Grid doesn't allow filter of dates correctly [132691]

The Denied/Rejected payments page had dates that could not filter by Date ranges or by Before or Equal to.

We fixed this issue so the dates will filter correctly.

### **AP Report is listing incorrect data [112775]**

A dealer reported that an account inaccurately showed an open balance and another account showed open invoices when it did not have any invoices due.

We resolved this to exclude deleted receipts, bills, and credits from the calculations on the Vendor listing page. This ensures that only active records are considered when displaying open receipt, bill, and credit amounts, resulting in an accurate open balance for each vendor.

### **RMR cancellation [129705]**

A user had an incorrectly cancelled RMR and tried to reactivate it. However, when editing the RMR the cancellation date line item disappeared. When trying to save the RMR for the next billing cycle, there was a message to remove the cancellation date, but this was not an option.

The Remove Cancellation button was not displayed when the cancellation date was before the next invoice date (RMR cycle start date). We changed this to allow cancellation removal regardless of how the two dates relate to each other.

### **When trying to reactivate a canceled RMR, I am getting a message to remove the cancel date but the cancel date field disappears [136293]**

The Remove Cancellation button was not displayed when the cancellation date was before the next invoice date (RMR cycle start date). We changed this to allow cancellation removal regardless of how the two dates relate to each other.

### **Business is misspelled on Lead page [137033]**

The column “Business” was misspelled on the Lead page (seen when adding the column). We corrected this.

### **Applied date is displaying Jan 1, 1970 [141610]**

We fixed this issue to show the correct applied date.

### **Sub-customer manual invoice bill to address not displaying as expected [140011]**

When creating a new manual invoice for a sub-customer of a master customer, an issue occurred where the Billing Address for the master customer did not populate automatically when the Invoice To Master option was toggled.

We fixed this so when turning the Invoice To Master switch on, the master customer’s Bill To addresses load in the Billing Address dropdown. When turning the switch off, the sub customer’s Bill To addresses are loaded back into Billing Address dropdown, with the primary Bill To address selected.

Also, when clicking the plus button to add a Bill To address, the address will be available in the Billing Address dropdown. This is a change: depending on whether the Invoice To Master switch is on or off, the address will be added either to the sub customer (if the switch is off), or to the master customer (if switch is on). It will also be added under the Bill To Information of the sub customer or master customer according to the same logic.

### **History printed date discrepancy [00140952]**

An RMR invoice was manually delivered on a specific date. However, in the expanded Additional Information section, the printed date showed a five hour difference. In addition, the invoice showed as printed when it was emailed.

We fixed this issue; however, the time zone for the date displayed in the inner Invoice History relies on the time zone defined in the system for the logged in user, so there still might be discrepancies between the date in the outer grid and the inner grid if the time zone defined for the user is not the same as the local time zone in the browser.

As for the invoice showing Printed when it was emailed: this happened because the underlying Delivery Method in the invoice details does not change when using the Deliver button. The Delivered/Printed indicator in the invoices grid relies on this value and will reflect the type of delivery set on the invoice. However, the history tracker will correctly display the delivery type that was selected; each time the Deliver button is clicked followed by clicking Send Notification, the history tracker will log the delivery type. If Save and Deliver is clicked instead of Deliver, the history tracker will log the Delivery Method already set in invoice details.

Lastly, the Invoice History grid now displays the printed/emailed action as a message action rather than an update action to distinguish it from actions where a field has been changed and to match the action of re-delivery.

### **Check boxes not shown on the preview (reopen case 00137228) [144163]**

We resolved this issue and these additional issues:

When deleting a nested field (one that is inside an object), the whole object was deleted. This has been addressed and now only the nested field is deleted, not the object containing it.

There was no check for unique field names. As a result, if two fields had the same name, for example, if two checkboxes named 'check1', in the assigning screen when checking one, both would get checked. We changed this to only allow name duplication if the fields are in different objects. Name duplication is also blocked in the top level in the form data.

The count of the required assigned and edited fields in the stages screen did not add up correctly. Fields that were created using the Add Field button needed to be dragged to the designer to show on the form. If they were missing in the designer (whether because they were never dragged into it, or because they were deleted from it), they would still show under the Required Form Data menu in the assignment screen. We are no longer factoring in fields that are in the form data but not in the designer to allow the form to be assigned and allow sending it to the recipient. Now any field that falls under this category is simply skipped over and filtered out.

### **Missing transaction for bank rec [144645]**

A user reported that a deposit payment was not showing up on a bank account reconciliation for the same date. The entries listed as available in the reconciliation screen were based on the deposit's GL entries. This bug resulted from the deposit GL entry adding two hundred milliseconds to the entry date, causing the ending date, which was for the same time without the two hundred milliseconds, to not be found.

We changed the search for the general ledger to compare the only entry date and ending date and not include the time.

### **You cannot edit/inactivate a customer portal user [144930]**

We resolved this issue so that users can edit customer portal users or make them inactive.

### **Cannot filter by transaction date on customer page [145037]**

We fixed this issue so users can filter by transaction date on the Customer page.

### **Voided work orders cannot be reopened [144935]**

The reopen tool was only checking for a closed date to toggle the visibility. We added a check for a voided date to allow voided work orders to be reopened.

### **Specific invoices should not appear when creating a transaction [145517]**

The logic for Open Invoices did not always filter out inactive invoices.

We are now filtering out inactive records from open invoices, open credits, and balance due.

### **Proposal with a part kit on it cannot be deleted [146900]**

We fixed the issue where proposals could not be deleted if they had part kits.

### **Receiving error when adding an RMR to a proposal that has a grouped charge [147625]**

The Proposal PDF was generating errors for RMR and Notes because, for tables other than Charges, the Charges Group Id does not exist.

We fixed this so the grouped logic applies only to the charges table.

### **Purchase orders fail [00147978]**

There was an error caused by the BranchID field on the purchase order details (parts) being null, which is no longer allowed.

We corrected this so parts on a purchase order will automatically populate with the branch set on the purchase order.

### **Changes to an eForm cannot be saved [00149336]**

Users could not save a template because the Save button was not active.

We fixed this issue so users can save their templates. Note: If elements on the template have an invalid placement, the template can still be saved.