Managely Release Notes

January 2026

Version 5.3.60

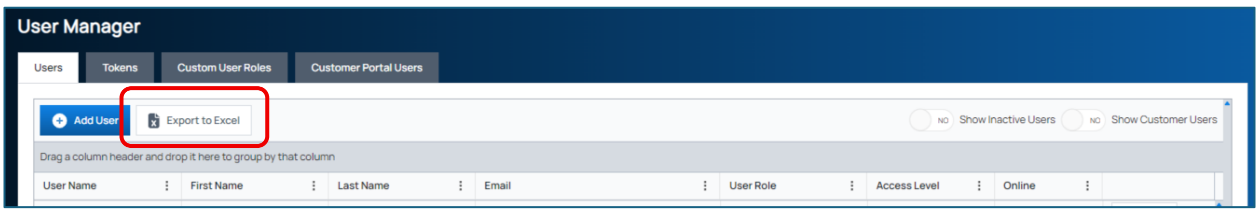
Contents

Enhancements

Setup

Added Export to Excel on User Management Page

On the User Management page (Setup > Company > User Manager), we added an **Export to Excel** button. Users can click this to export the users shown on all grid pages to one spreadsheet. In the spreadsheet, the users are in the order shown on the grid with column headings for the visible columns on the grid.

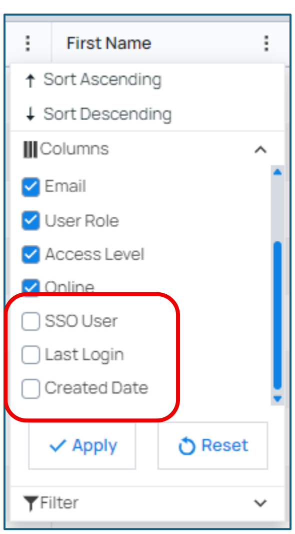


Added SOX-Required User Columns to User Management Page

On the User Management page (Setup > Company > User Manager), we added three new read-only columns that users can show on the grid. By default, these columns are hidden.

- SSO User (indicates if this a single sign-on user)
- Last Login
- Create Date

These are audit fields for SOX (Sarbanes-Oxley Act) compliance.



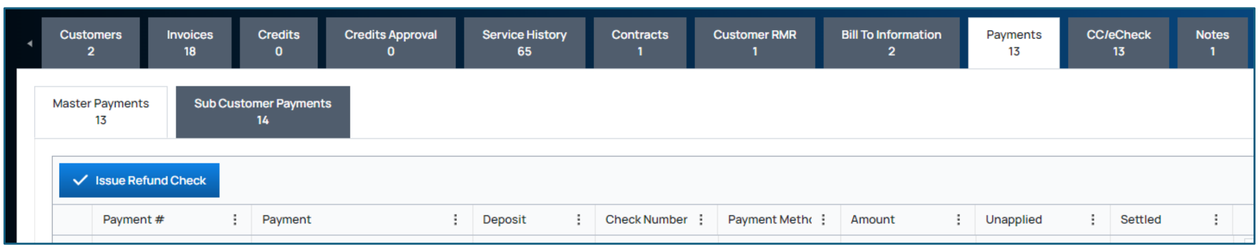
To add any of these columns, click the kabob menu (three dots) beside a column name in the grid. Click Columns. Scroll down the list to find the new columns. Select the checkbox beside any or all of them. Click Apply. The grid shows the selected column(s).

CRM

How to Refund Payments to Customers [00147141]

Users were unable to issue paper check refunds for master customers.

On the detail page for a master customer on the Payments tab and Master Payments sub tab, we enabled the **Issue Refund Check** button. Users can click this to issue a paper check refund to the master customer.



Note: The **Issue Refund Check** button is hidden on the Sub Customer Payments tab.

Templates & Forms

Added PDF Preview to Template Designer and Send Form Preview Button

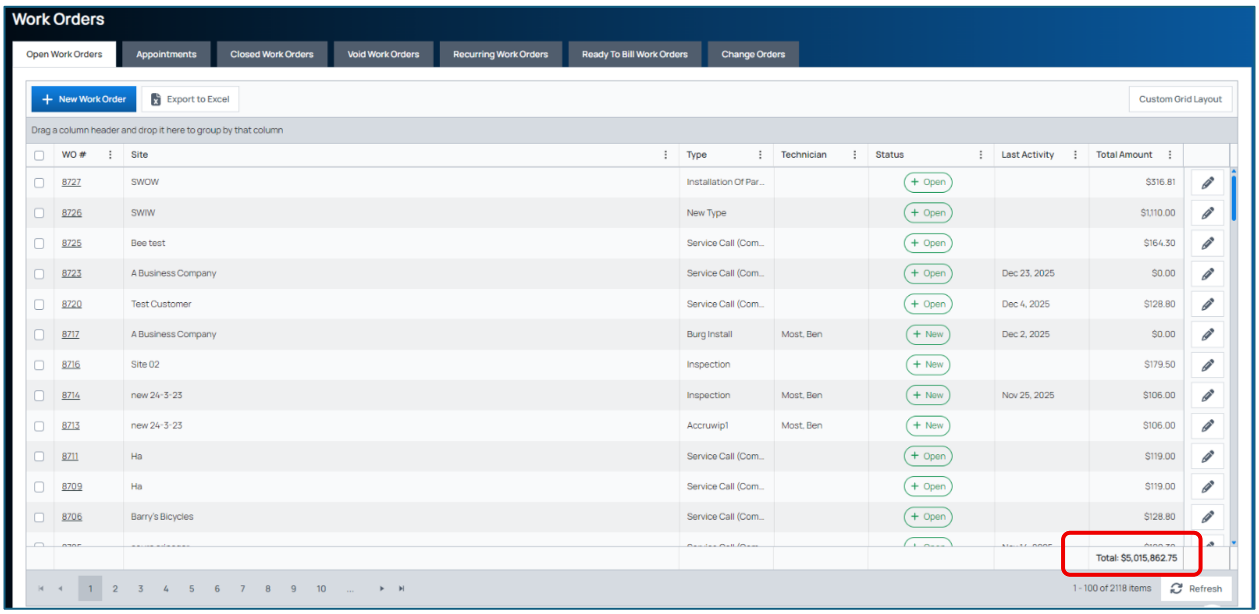
When users click the Preview button on the template designer, form designer. or send forms screen, the PDF viewer now displays the PDF file contents and includes a download button. In addition, for the button on the completed form details, we replaced the “Download” text with “Preview”.

Note: When using the preview to print a PDF file, if the PDF file has a non-standard size due to having a background PDF image (for example, 8.5 by 14 inches), the initial display of the print dialog may clip the content. To fix this, click More Settings to expand the menu and choose either Fit to Paper or Fix to Print Area in the Scale dropdown. If one of these options is already selected, then swap to the other one to make the change take effect.

Accounts Receivable

Added Total Amount Field on Work Orders Grid [00148593]

We added a Total Amount below the Work Orders grid. This is a total of all work orders visible on all grid pages. The total will change if users filter out any work orders.



Application Corrections

Can't send statements [00148765]

When users tried to batch run statements manually, there was a loading spinner but it did not complete.

The Deliver Customer Statement grid took 10 to 30 seconds to load. We resolved this by improving the load time.

Fields are unable to be seen when using dark mode on appointments [00149414]

We fixed this so that all tabs have the panel color applied.

Customer search bar up top is displaying customer twice [00149413]

We fixed the issue of values appearing twice in the top search bar.

Work order invoice issues [00150662]

Work orders showed as completed; however, no invoice was generated.

We resolved this issue by allowing $0 work orders (for example, those with warranties) to generate invoices.

Bank reconciliation will not save [00151750]

The issue was caused by the bank reconciliation save process that excluded any GL entry that did not have a reconciliation Id already set, which was excluding user selected entries in the grid (thus saving had no effect).

With this fix, it will include user selected entries and properly update the credit/debit amounts on the reconciliation. Additionally, clicking Finish Later and then re-opening the reconciliation will show previously selected entries in the grid. This will allow users to make changes to the reconciliation, save, finish later, or finish.