



Managely Release Notes

January 2026

Version 5.3.61

MANAGELY®

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Enhancements

CRM

Statements Include Site Information [00150110]

When generating statements for customers (CRM > Customers > Customer # hyperlink > Invoices tab > Generate Statements button), the statements now show site information (site name, address, city, and state). If a customer has multiple sites, the invoices are grouped by site.

Invoices					
Invoice #	Invoice Date	Due Date	P.O. #	Invoice Amount	Amount Due
Site 1 ABC (commercial), 8800 Lyra Drive, Columbus, OH					
5150	05/01/2024	05/11/2024		\$173.02	\$173.02
5159	05/03/2024	05/18/2024		\$1,134.50	\$1,134.50
5269	06/01/2024	06/11/2024		\$78.30	\$78.30
5404	07/01/2024	07/11/2024		\$68.30	\$68.30
5565	01/27/2025	02/06/2025		\$468.10	\$468.10
5755	08/25/2025	09/04/2025		\$478.10	\$478.10
Site 2 ABC (commercial), 8800 Lyra Drive, Columbus, OH					
6128	12/01/2025	12/11/2025		\$263.20	\$263.20
6281	01/01/2026	01/11/2026		\$68.30	\$68.30

Accounts Receivable

Funding (Deposit) Details on Transaction Screen to Support Bank Reconciliation

On the Deposits page, Deposits Payment grid, Transaction page, and Reconciliation page, we added funding information so users can see and reconcile Managely transactions to bank deposits without need to cross-reference Forte or external reports. The funding data shown is read-only, and these changes are for only eCheck and credit card batches processed through Forte.

There is a new switch on these pages called Show Funding. By default, this switch is NO. To see additional information in new columns (Funding # (number), Funding Status, Funding Batch Amount, and Funding Date), set this switch to YES.

Deposits list page (Accounts Receivable > Payments > Deposits)

3301

May 18, 2023

2

10101 - Charter One - Primary Checking - Ohio

CREDIT_CARD

! No

! No

\$174.90

\$174.90

Export to Excel

NO Show Funding

#	Payment Date	Customer	Check #	Type	Amount	\$ Unapplied	Settled	Refunded	Apply
2350	5/18/23	ABC Building Blocks - 4329		Master Card	\$6.60	\$0.00	<div></div> NO	<div>! No</div>	
2351	5/18/23	Smokey Treats BBQ - 4341		Visa	\$168.30	\$0.00	<div></div> NO	<div>! No</div>	

1

1 - 2 of 2 items

Refresh

Deposits details page (Accounts Receivable > Payments > Deposits > Batch # hyperlink)

Deposits									
Credit Card - Deposit #3547 History									
Deposit Total \$11,222.61		Payments Entered Total \$11,222.61		Deposit Remaining \$0.00		Deposit Date: December 12, 2025 Number of Payments: 1 Reconciled: NO Settled: NO			
Deposit Payments									
Export to Excel									
#	Payment Date	Customer	Check #	Type	Amount	\$ Unapplied	Settled	Refunded	Apply
2836	12/12/25	beesolver 2 - 4452		Visa	\$11,222.61	\$0.00	NO	! No	

NO Show Funding

Deposits details page with the **Show Funding** switch set to YES, showing additional columns:

Deposits									
Credit Card - Deposit #3547 History									
Deposit Total \$11,222.61		Payments Entered Total \$11,222.61		Deposit Remaining \$0.00		Deposit Date: December 12, 2025 Number of Payments: 1 Reconciled: NO Settled: NO			
Deposit Payments									
Export to Excel									
#	Payment Date	Customer	Check #	Type	Amount	\$ Unapplied	Settled	Refunded	Apply
2836	12/12/25	beesolver 2 - 4452		Visa	\$11,222.61	\$0.00	NO	! No	

YES Show Funding

Funding #	Funding Status	Funding Batch An	Funding Date	Apply
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Reconciliation Record page (GL > Bank Accounts > Bank Name Hyperlink > Reconciliation tab > Ending Date hyperlink > Deposits/Credits tab)

Reconciliation Record For Charter One
For Statement ending on 8/30/17

Print History

Beginning Balance	\$0.00	Interest Earned	\$0.00
Ending Balance	\$0.00	Checks & Payments	\$100.00
Service Charge	\$0.00	Deposits & Credits	\$100.00
Service Charge Account	25055 - Accrued Revenue	Interest Earned Account	40000 - Inventory

Checks/Payments Deposits/Credits

Drag a column header and drop it here to group by that column

Date	Number	Vendor	Memo	Amount					
May 4, 2015	00065		Deposit - 4	\$50.00					
<p>Export to Excel Deposit Payments</p> <p>NO Show Funding</p>									
#	Payment Date	Customer	Check #	Type	Amount	\$ Unapplied	Settled	Refunded	Apply
5	5/4/15	Travis Pacey - 3028	125	Check	\$50.00	\$0.00	yes	1 No	
1 - 1 of 1 items Refresh									
May 6, 2015	00067		Deposit - 6	\$25.00					
Jun 3, 2015	00068		Deposit - 7	\$25.00					

Accounts Payable

Vendor Contacts [00145653]

On the Vendor detail page (Accounts Payable > Vendors > Vendor # hyperlink), we added the Contacts tab. Users can use this tab to add vendor contacts and view a list of exiting contacts:

Purchase Orders 69 Receipts 45 Bills 21 Recurring Bills 2 Payments 19 Credits 9 Checks 26 Parts 72 Notes 2 Documents 1 Part Ledger 22 Tax 9

Contacts 0

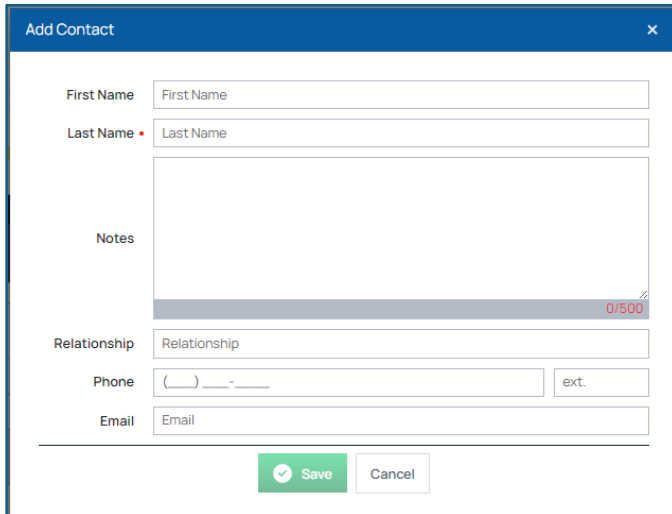
+ Add New Contact

Contact Name	Relationship	Phone	Email	Notes
No records available.				

0 - 0 of 0 items Refresh

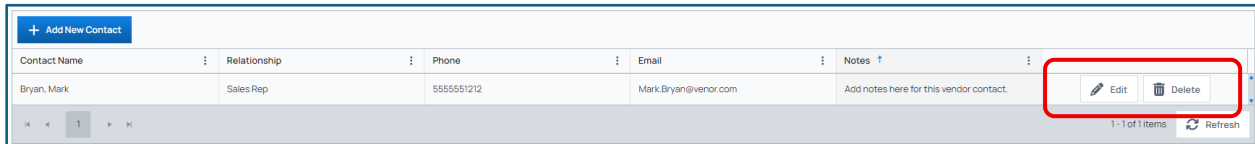
Users can sort the information in the columns (Contact Name, Relationship, Phone, Email, and Notes) and can filter the information in any of the columns.

Click the **Add New Contact** button to open the Add Contact form:



The 'Add Contact' form is a modal window with a blue header. It contains the following fields: 'First Name' (text input), 'Last Name' (text input), 'Notes' (text area with a '0/500' character count), 'Relationship' (text input), 'Phone' (text input with a format guide '() - ' and an 'ext.' field), and 'Email' (text input). At the bottom are 'Save' and 'Cancel' buttons.

After adding contacts, users can edit or delete any using the buttons in the grid row.



The screenshot shows a table with columns: Contact Name, Relationship, Phone, Email, and Notes. A single row is visible for 'Bryan, Mark'. To the right of the table, a red box highlights 'Edit' and 'Delete' buttons. The bottom of the table shows '1 - 1 of 1 items' and a 'Refresh' button.

Contact Name	Relationship	Phone	Email	Notes
Bryan, Mark	Sales Rep	5555551212	Mark.Bryan@venor.com	Add notes here for this vendor contact.

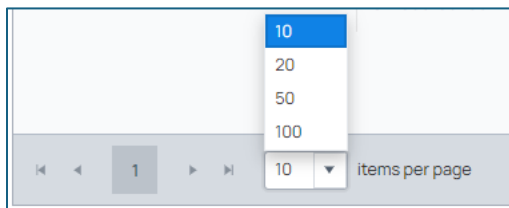
Setup

Items Per Page Dropdown on Package Details Page [00147734]

On the Package detail page (Setup > Proposals > Packages > Name hyperlink), we added an items per page selector at the bottom of the Items tab and Parts tab. Users can choose to show 10, 20, 50, or 100 items or parts per page on the tabs.



The screenshot shows a pagination control with a dropdown menu for 'items per page'. The dropdown is currently set to '10'.



The screenshot shows the 'items per page' dropdown menu open, displaying options: 10, 20, 50, and 100. The '10' option is selected.

Application Corrections

Groups on proposals are not saving with the release of Managely 5.3.58.11 [00150616]

The groups on proposals were not saving.

The Name and Description fields allowed spaces and no text, which caused issues when saved.

We changed this so starting the name and description with spaces is no longer allowed but can use spaces between words and characters. Users can also start the name and description with these characters: `^(?!*$).+`