



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

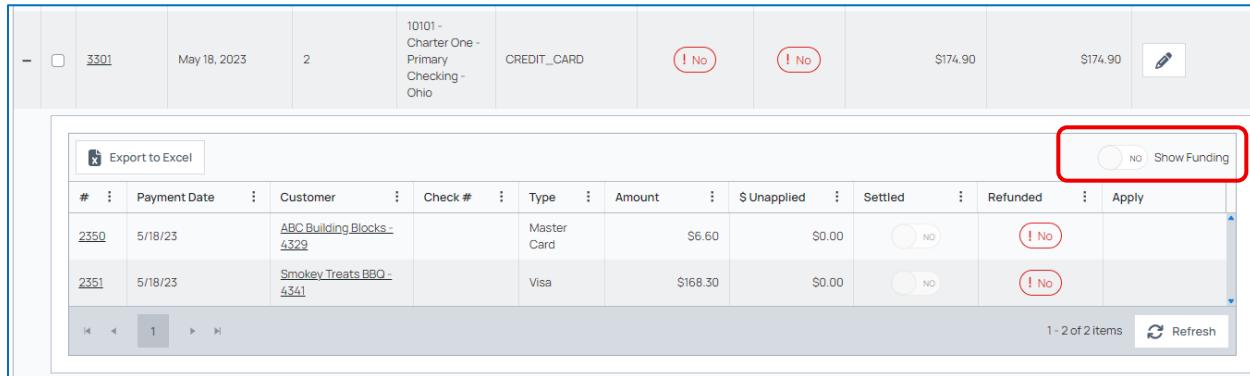
Accounts Receivable

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.

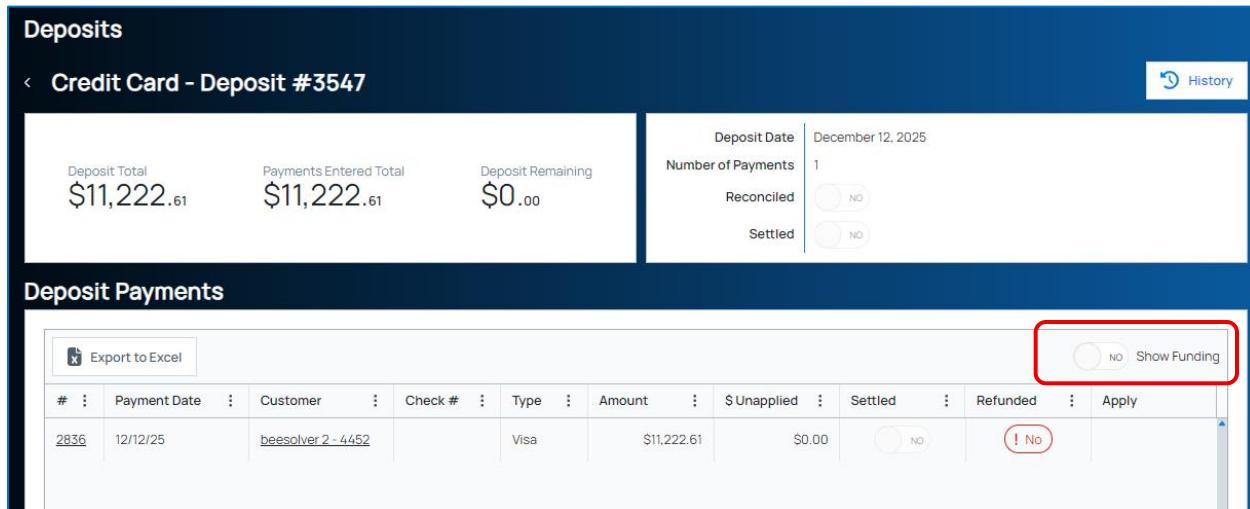
There is a new switch on these pages called Show Funding. By default, this switch is NO. To see additional information in new columns (Funding # (number), Funding Status, Funding Batch Amount, and Funding Date), set this switch to YES.

Deposits list page (Accounts Receivable > Payments > Deposits)



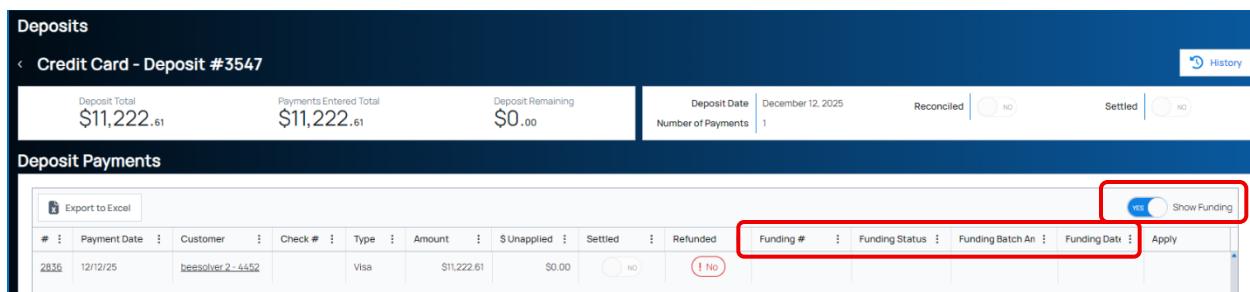
#	Payment Date	Customer	Check #	Type	Amount	\$ Unapplied	Settled	Refunded	Apply
2350	5/18/23	ABC Building Blocks-4329		Master Card	\$6.60	\$0.00	<input type="radio"/> NO	<input checked="" type="radio"/> ! No	
2351	5/18/23	Smokey Treats BBQ-4341		Visa	\$168.30	\$0.00	<input type="radio"/> NO	<input checked=""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

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



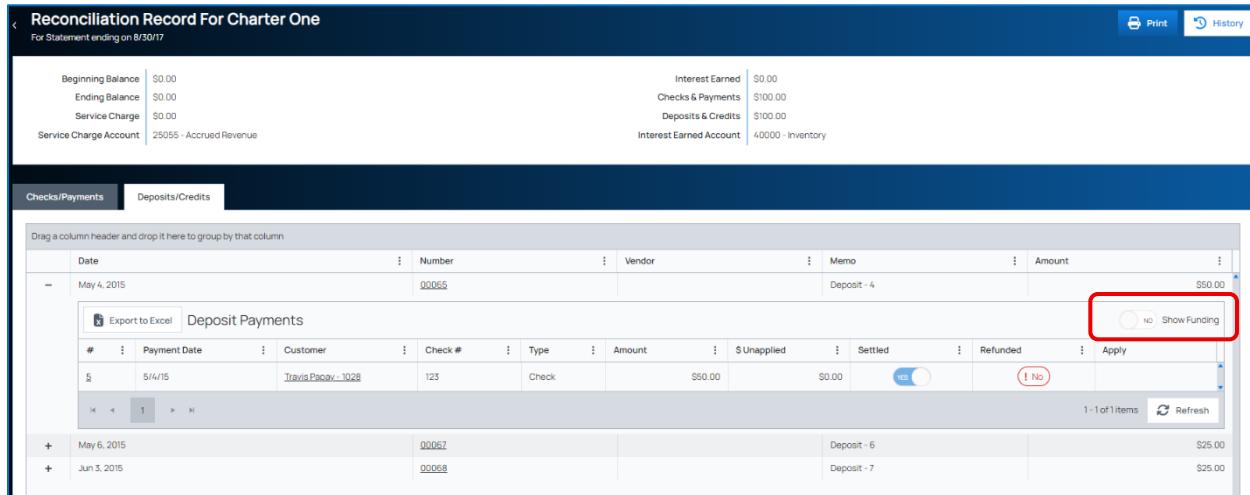
#	Payment Date	Customer	Check #	Type	Amount	\$ Unapplied	Settled	Refunded	Apply
2836	12/12/25	beesolver 2- 4452		Visa	\$11,222.61	\$0.00	<input type="radio"/> NO	<input checked="" type="radio"/> ! No	

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



#	Payment Date	Customer	Check #	Type	Amount	\$ Unapplied	Settled	Refunded	Funding #	Funding Status	Funding Batch An	Funding Date	Apply
2836	12/12/25	beesolver 2- 4452		Visa	\$11,222.61	\$0.00	<input type="radio"/> NO	<input checked="" type="radio"/> ! No					

Reconciliation Record page (GL > Bank Accounts > Bank Name Hyperlink > Reconciliation tab > Ending Date hyperlink > Deposits/Credits tab)

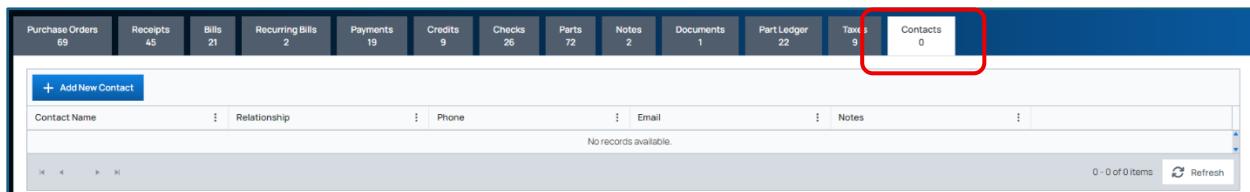


The screenshot shows the 'Reconciliation Record For Charter One' page. At the top, there are summary details: Beginning Balance (\$0.00), Ending Balance (\$0.00), Service Charge (\$0.00), Service Charge Account (25055 - Accrued Revenue), Interest Earned (\$0.00), Checks & Payments (\$100.00), Deposits & Credits (\$100.00), and Interest Earned Account (40000 - Inventory). Below this, there are two tabs: 'Checks/Payments' and 'Deposits/Credits'. The 'Deposits/Credits' tab is selected. A grid displays transaction details, including Date, Number, Vendor, Memo, and Amount. A specific row for May 4, 2015, is highlighted. A red box surrounds the 'No Show Funding' checkbox in the grid's header row.

Accounts Payable

Vendor Contacts [00145653]

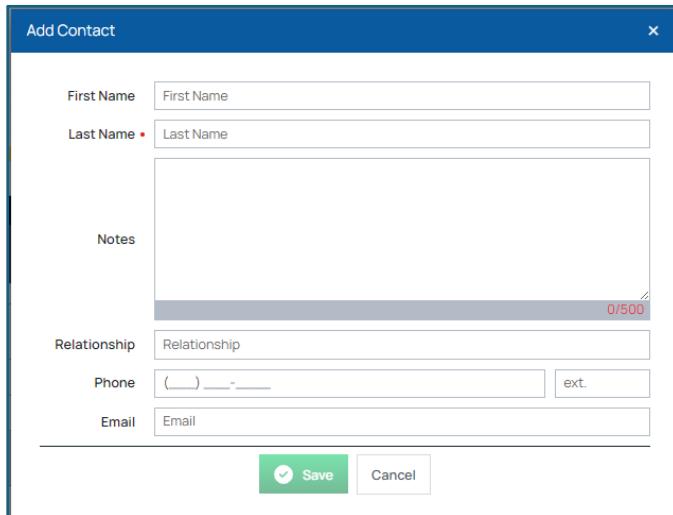
On the Vendor detail page (Accounts Payable > Vendors > Vendor # hyperlink), we added the Contacts tab. Users can use this tab to add vendor contacts and view a list of existing contacts:



The screenshot shows the 'Vendor detail page' with a top navigation bar containing various tabs: 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), and Contacts (0). A red box highlights the 'Contacts' tab. Below the navigation bar, there is a table for managing vendor contacts with columns for Contact Name, Relationship, Phone, Email, and Notes. A message indicates 'No records available.' at the bottom of the table.

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:

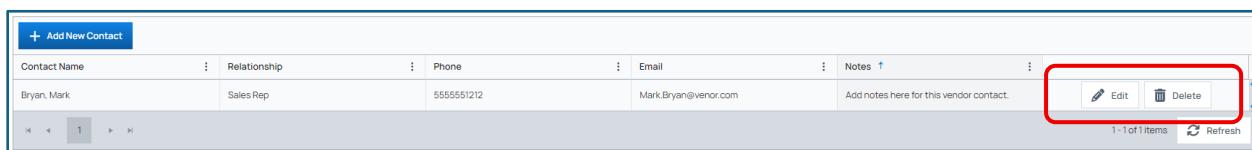


The form is titled 'Add Contact'. It contains the following fields:

- First Name: Text input field.
- Last Name: Text input field with a red asterisk indicating it is required.
- Notes: Text area with a character limit of 500, currently at 0/500.
- Relationship: Text input field.
- Phone: Text input field with a placeholder '(____) ____-____' and an 'ext.' input field.
- Email: Text input field.

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 grid shows a single contact entry:

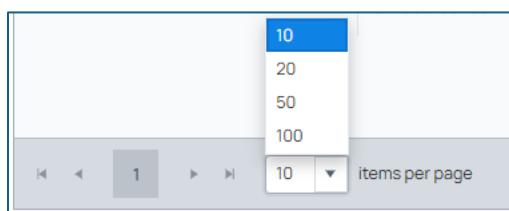
Contact Name	Relationship	Phone	Email	Notes	Actions
Bryan, Mark	Sales Rep	5555551212	Mark.Bryan@vendor.com	Add notes here for this vendor contact.	Edit Delete

At the bottom are buttons for '1-10 of 11 items' and 'Refresh'.

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.



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: ^(?!*\$.)+