# Managely Release Notes

**January 2026**

**Version 5.3.61**

# Contents

# 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 |

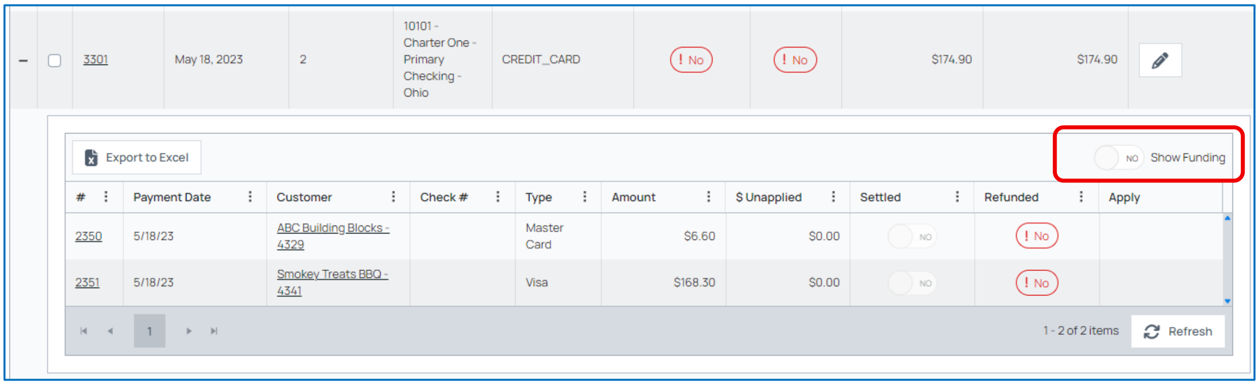
## Accounts Receivable

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

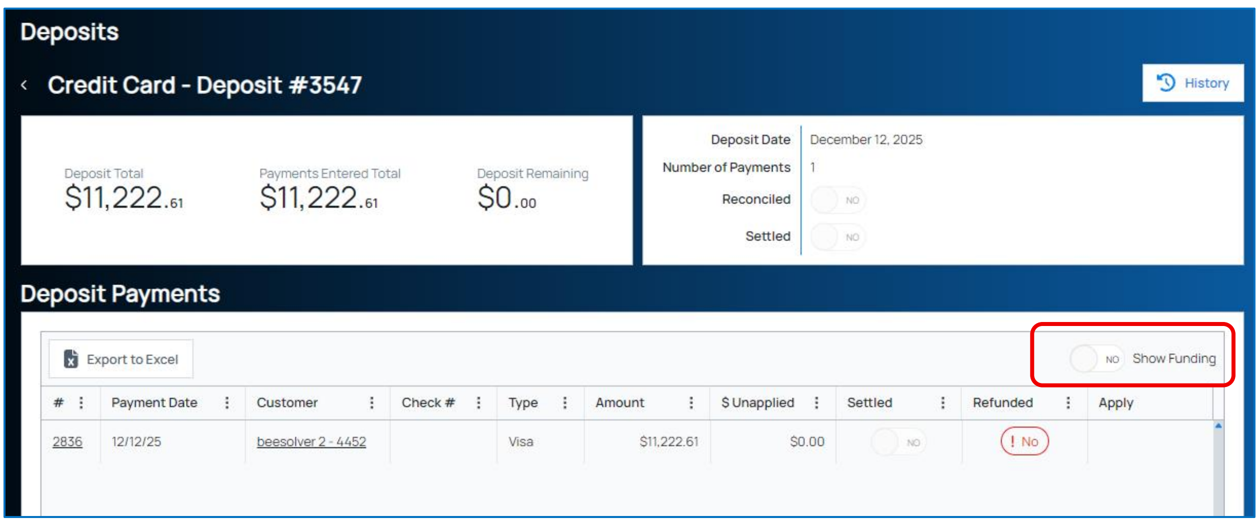
On the Deposits page, Deposits Payment grid, Transaction page, and Reconciliation page, we added funding information so users can see and reconcile Managely transactions to bank deposits without need to cross-reference Forte or external reports. The funding data shown is read-only, and these changes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

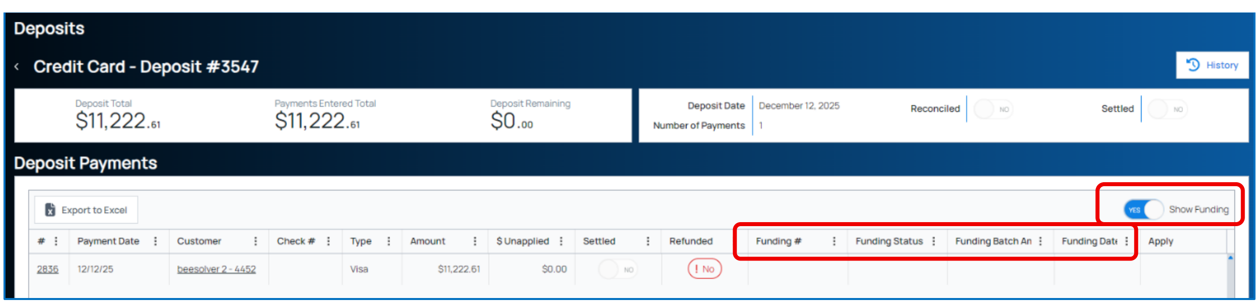
Deposits list page (Accounts Receivable > Payments > Deposits)



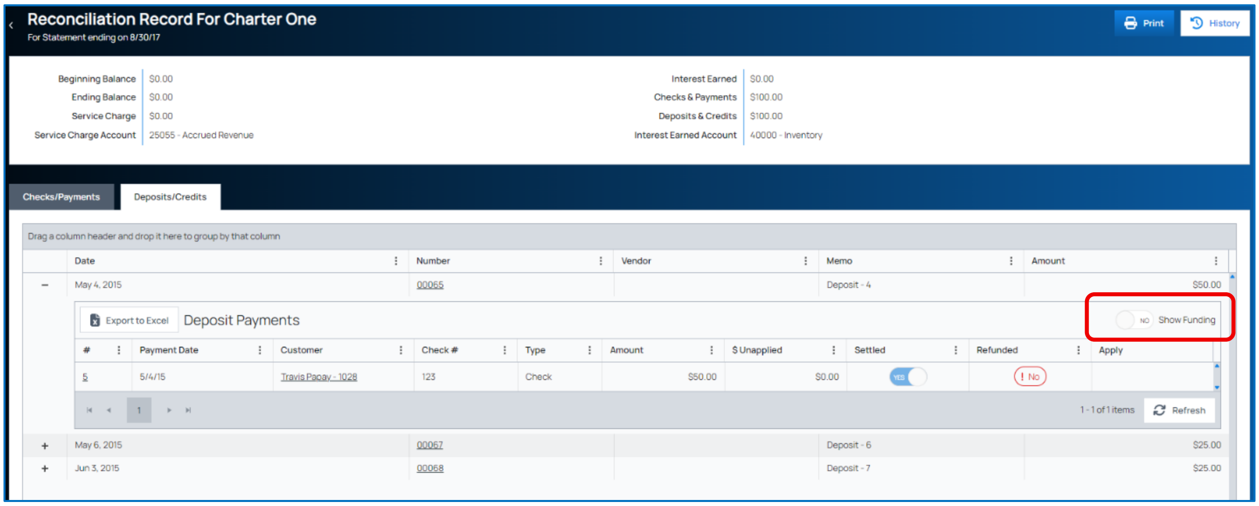

Deposits details page (Accounts Receivable > Payments > Deposits > Batch # hyperlink)




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



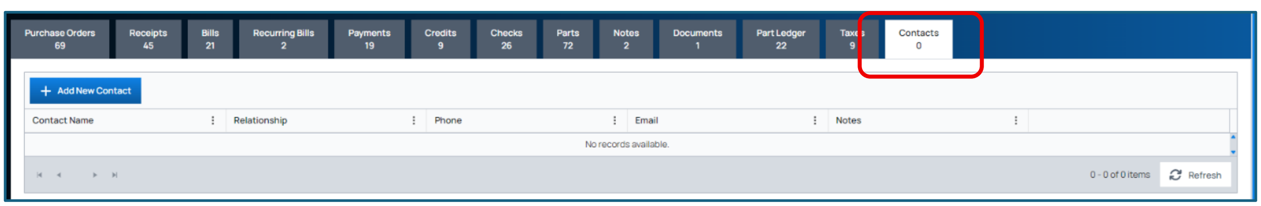
Reconciliation Record page (GL > Bank Accounts > Bank Name Hyperlink > Reconciliation tab > Ending Date hyperlink > Deposits/Credits tab)




# Accounts Payable

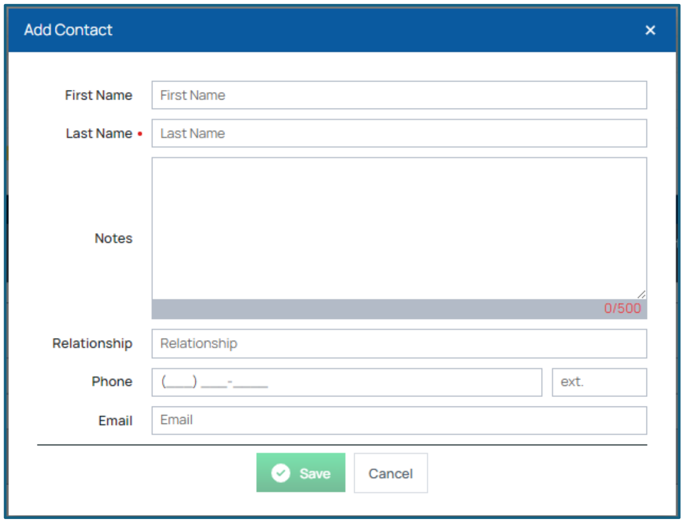
## Vendor Contacts [00145653]

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:

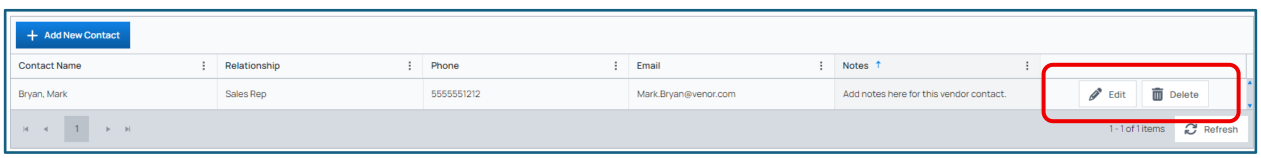



Users can sort the information in the columns (Contact Name, Relationship, Phone, Email, and Notes) and can filter the information in any of the columns.

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



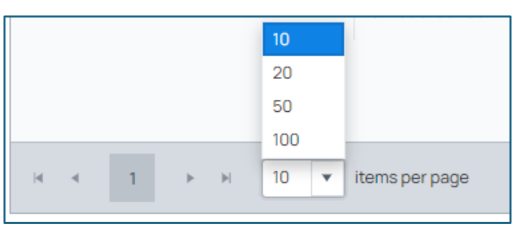

After adding contacts, users can edit or delete any using the buttons in the grid row.




# 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: ^(?!*$).+