



Managely Release Notes

February 2026

Version 5.3.62

MANAGELY®

Contents

Enhancements2

 Accounts Receivable.....2

 Multiple Invoice on one Payment [00144735]2

 Invoice Numbers on Payment Receipt Email [00144738]4

 Indicator Showing Additional Technicians on Appointments Grid4

 Accounts Payable5

 Vendor Search [00142454]5

Application Corrections6

 Second line on bill to address not appearing on invoices [00150289]6

 The timesheet uploader is not working [00151690]6

 Help closing work order ASAP [00153094]7

 Mobile technicians cannot access tasks7

Enhancements

Accounts Receivable

Multiple Invoice on one Payment [00144735]

This update introduces multi-invoice payment functionality within the Payments → Deposit → Create Deposit workflow. In addition to paying a single invoice, users can apply a payment to multiple invoices.

Users can also enter partial payment amounts for each selected invoice with all necessary invoice details displayed for clarity. The system can automatically allocate the payment across the selected invoices, and any remaining amount is posted to unapplied cash.

Open the Deposits page (Accounts Receivable > Payments > Deposits > +Add Deposit button).

Complete the required fields. Be sure to enter an **Amount** in the Add Payment panel.

Click the **Pay By Invoice** button. This is the + button beside the Invoices field. Hovering over this button shows the name in a tooltip.

The screenshot displays the 'Deposits' interface. At the top, there's a 'New Deposit' section with fields for 'Deposit Amount' (\$350.00), 'Deposit Date' (2/2/2026), and 'Bank Account' (10102 - First National Bank). To the right, a summary shows 'Deposit Total' (\$350.00), 'Payments Entered Total' (\$0.00), and 'Deposit Remaining' (\$350.00). Below this is the 'Add Payment' section. It includes 'Payment Date' (2/2/2026), 'Payment Type' (Cash), and 'Customer' (beesolver 2 - 4452). A red box highlights the 'Invoices' section, which contains an 'Invoice Search: invoice #' field and a '+' button. Other fields in this section include 'Amount' (\$350.00) and 'Late Fee Amount' (\$0.00). On the right, there's an 'Auto Apply?' toggle set to 'NO' and a 'Memo' field. A green 'Apply to deposit' button is at the bottom right.

This opens the Pay By Invoice popup:

Pay By Invoice [X]

Search Invoice [Q] Invoices Selected: 3 Applied: \$315.00 Unapplied: \$35.00 Amount: \$350.00

Invoice #	Invoice Date	Due Date	Total Amount	Amount Due	Pay	Payment Amount
6308	Jan 1, 2026	Jan 11, 2026	\$194.65	\$76.65	<input type="radio"/> NO	\$0.00
6383	Feb 2, 2026	Feb 2, 2026	\$105.00	\$105.00	<input checked="" type="radio"/> YES	\$105.00
6385	Feb 2, 2026	Feb 2, 2026	\$105.00	\$105.00	<input checked="" type="radio"/> YES	\$105.00
6387	Feb 2, 2026	Feb 2, 2026	\$105.00	\$105.00	<input checked="" type="radio"/> YES	\$105.00
6367	Jan 27, 2026	Feb 26, 2026	\$10.00	\$10.00	<input type="radio"/> NO	\$0.00

1 - 5 of 5 items Refresh

+ Add Invoices **X Cancel**

In an invoice row, click the Pay switch from NO to YES. The Payment Amount defaults to the full invoice amount if possible. Repeat this for other listed invoices. Users can enter the full amount on an invoice or a partial amount. Click the **Add Invoices** button. Any leftover amount goes to unapplied cash on the customer's account.

The Pay By Invoices popup closes. The **Invoices** field shows the number of invoices selected.

Add Payment

Payment Date: 2/3/2026 Customer Balance: -\$11,006.73 Late Fee Due: \$0.00

Payment Type: Cash

Customer: beesolver 2 - 4452

Invoices 3 invoices selected [X] [+]

Amount: \$350.00

Late Fee Amount: \$0.00

Users can click the x beside the invoices to clear the field and start over.

Invoice Numbers on Payment Receipt Email [00144738]

When customers receive a payment receipt email, they can now see the invoice numbers that their payment was applied to.

When users send a payment receipt email to customers (via Accounts Payable > Deposits > payment on a deposit > Deliver), the email lists any invoices that the payment was applied to. This applies to both CC/eCheck and manual payments. For example:

Dear Jane Doe,

This email is a confirmation that we have processed Payment 73 on your account for the amount of \$62.15, using your credit card ending in 4242 on 12/12/2025.

Applied to Invoice(s):

- Invoice #10132
- Invoice #10133

Thank you for being a valued Base Dealer customer!

If no invoices were applied, the email message tells the customer the payment has not been applied to an invoice:

Dear Jane Doe,

This email is a confirmation that we have processed Payment 73 on your account for the amount of \$62.15, using your credit card ending in 4242 on 12/12/2025.

This payment has not yet been applied to an invoice.

Thank you for being a valued Base Dealer customer!

Indicator Showing Additional Technicians on Appointments Grid

On the work order detail Appointments tab (Accounts Receivable > Work Order > WO# hyperlink > Appointments tab), we added an indicator to show additional technicians on the appointment. Users will

see this indicator only when there are additional technicians on the appointment and will see the additional technicians when hovering over the indicator with the mouse pointer.

Appointments		Items 2	Parts 0	Part Kits 0	RMR 0	Billing	Notes 0	Site Notes 0	Documents 2
+ Add Appointment		Overview							
Appt #	Appointment Time	Last Activity	Status	Technician					
	1/29/26, 9:00 AM	1/29/26, 9:00 AM	Scheduled	Kathy Ackerman					
				<div>Loyd Atkinson Lenny Ballinger</div> <div>+2</div>					

Accounts Payable

Vendor Search [00142454]

On the Vendors list page (Accounts Payable > Vendors). We added a vendor search in the top left corner:

Vendors

Search Vendors

+ New Vendor

Export to Excel

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

As users type characters in this search, the system begins displaying results. The results show any vendors that have the characters in the number or name. Typing more characters narrows the results even more.

For example: This shows all vendors that contain the letter “a”:

Vendors

Search: a + New Vendor Export to Excel

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

Vendor #	Name
1001	ADI
1003	Bold Group Software
1004	Joseph & Joseph Attorneys
1005	Acme Alarm Services
1235	A1 Testing Labs
1236	Ace Hardware
2505	Anthony J Miller
2506	Corner Hardware&Electric
3000	CJ Bakery
3001	Harry's Vendor
3002	Acme Supplies
3003	Grainger
3004	Electric Company
3005	AAA Supplies
3006	Sam's Security Systems
3007	Battery Pro
3010	A Subcontractor Vendor
3011	Potter Signal
3015	ATS

1

This shows all vendors that contain the letters “ab”:

Vendors

Search: ab + New Vendor Export to Excel

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

Vendor #	Name
1235	A1 Testing Labs
3026	ABC

Application Corrections

Second line on bill to address not appearing on invoices [00150289]

The second line on the Bill To screen was not printing on invoices.

We fixed this issue.

The timesheet uploader is not working [00151690]

There was an error on the Timesheet Uploader indicating the Project field was required; however, Projects has not been implemented in Managely yet.

We fixed this error and updated the timesheet template. The Employee column is now a drop down where technicians are preloaded as an option to select. Also, there is an additional sheet to see the Employees list.

Help closing work order ASAP [00153094]

A user tried to close a work order and got an error message: Parts: null will have quantity in null, adjust part quantity. [cid:ef5e1fed-e873-4bcd-a08c-ef36eb2edb76] This issue happened due to a part that was newly added through setup that was used in a direct purchase order for a work order without hitting warehouses and there was no record of that part in the aWarehousePart table.

We fixed this issue so that users can add parts and use them in direct purchase orders without first adding the parts to a warehouse.

Mobile technicians cannot access tasks

When trying to access the Tasks, a technician using the Sedona-X mobile app received an unauthorized error.

We corrected this by adding the SedonaOneMobileApp user role to the Task queries.