Managely Release Notes

February 2026

Version 5.3.62

MANAGELY®

Contents

Enhancements

Accounts Receivable

Multiple Invoice on one Payment [00144735]

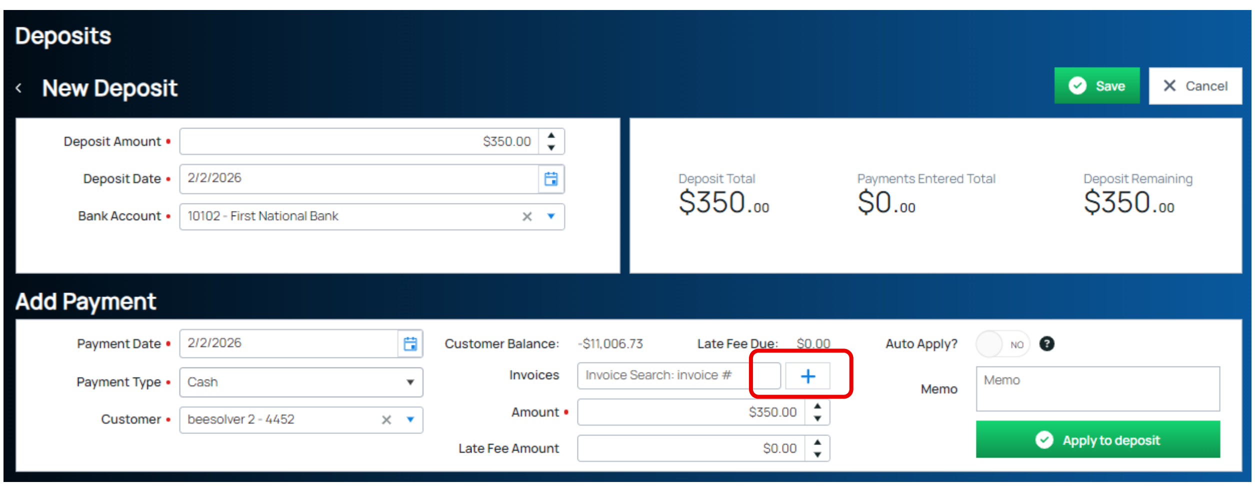
This update introduces multi-invoice payment functionality within the Payments → Deposit → Create Deposit workflow. In addition to paying a single invoice, users can apply a payment to multiple invoices.

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.

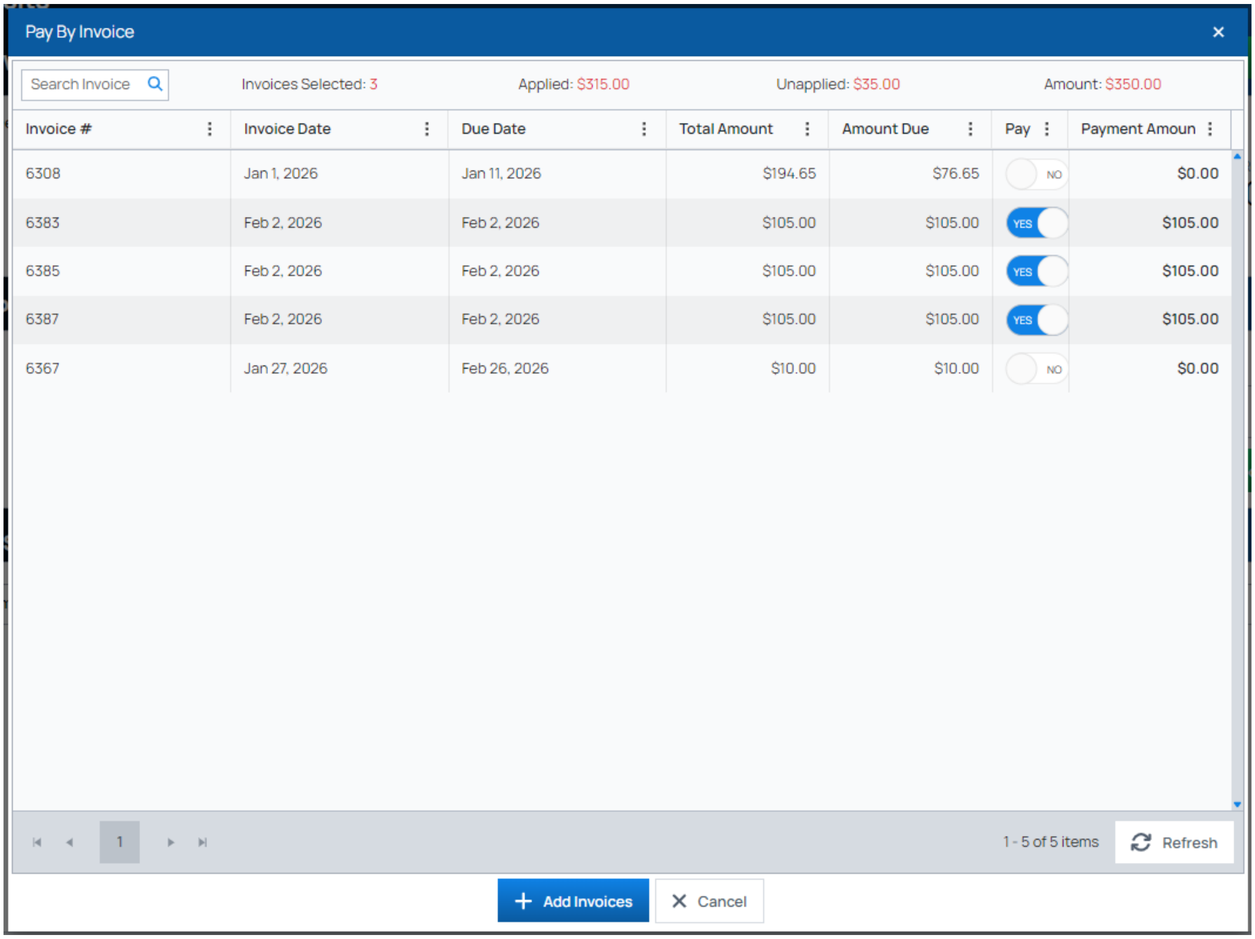
Open the Deposits page (Accounts Receivable > Payments > Deposits > +Add Deposit button).

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.

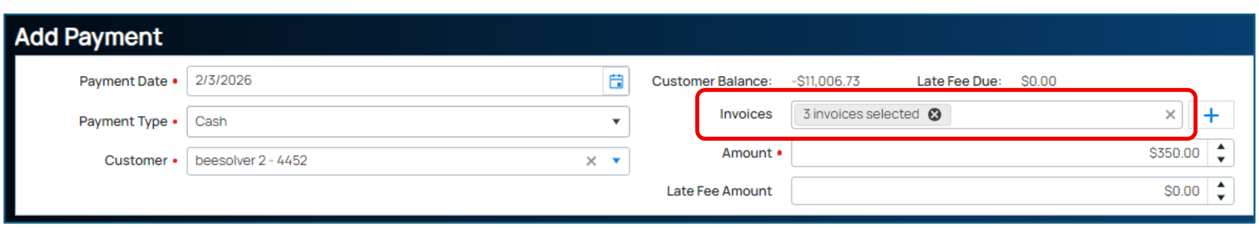


This opens the Pay By Invoice popup:



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.



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:

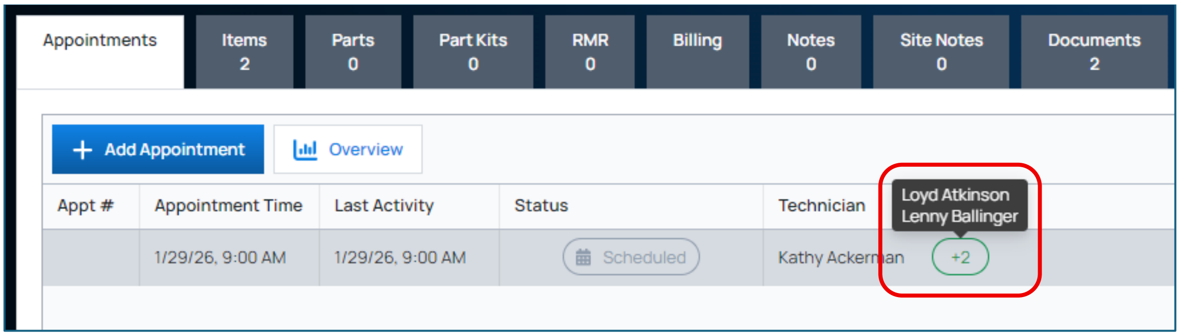
> Dear Jane Doe,
>
> This email is a confirmation that we have processed Payment 73 on your account for the amount of $62.15, using your credit card ending in 4242 on 12/12/2025.
> Applied to Invoice(s):
> - Invoice #10132
> - Invoice #10133
>
> **Thank you for being a valued Base Dealer customer!**

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

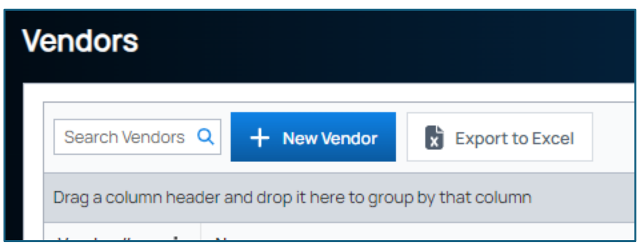
On the work order detail Appointments tab (Accounts Receivable > Work Order > WO# hyperlink > Appointments tab), we added an indicator to show additional technicians on the appointment. Users will see this indicator only when there are additional technicians on the appointment and will see the additional technicians when hovering over the indicator with the mouse pointer.



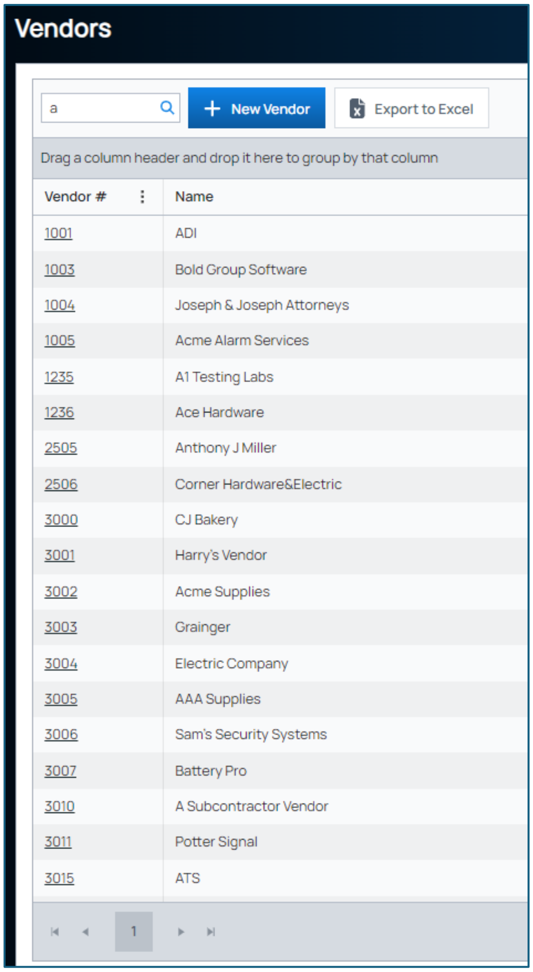
Accounts Payable

Vendor Search [00142454]

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



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.

<table>
<tr>
<td>For example: This shows all vendors that contain the letter “a”:</td>
<td>This shows all vendors that contain the letters “ab”:</td>
</tr>
<tr>
<td>


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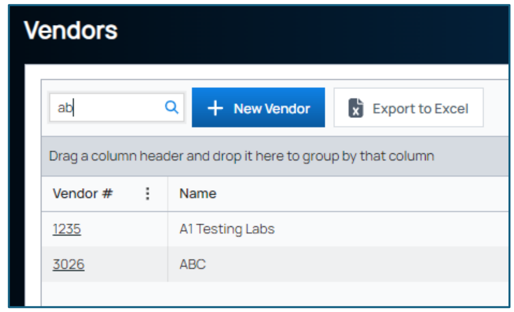

</td>
</tr>
</table>

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.