



# Managely Release Notes

February 2026

Version 5.3.62

**MANAGELY®**

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## Enhancements

### Accounts Receivable

#### Multiple Invoice on one Payment [00144735]

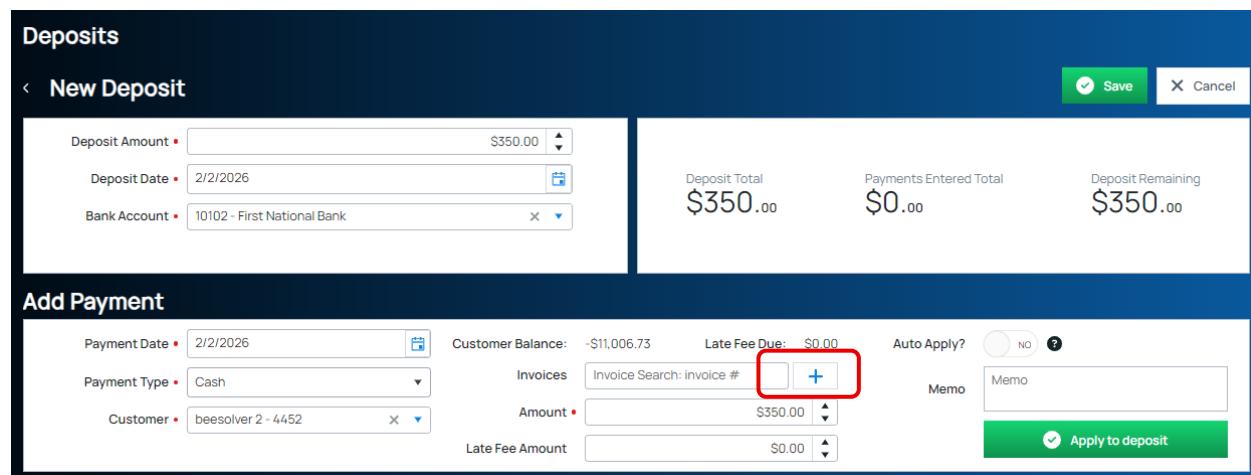
This update introduces multi-invoice payment functionality within the Payments → Deposit → Create Deposit workflow. In addition to paying a single invoice, users can apply a payment to multiple invoices.

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).

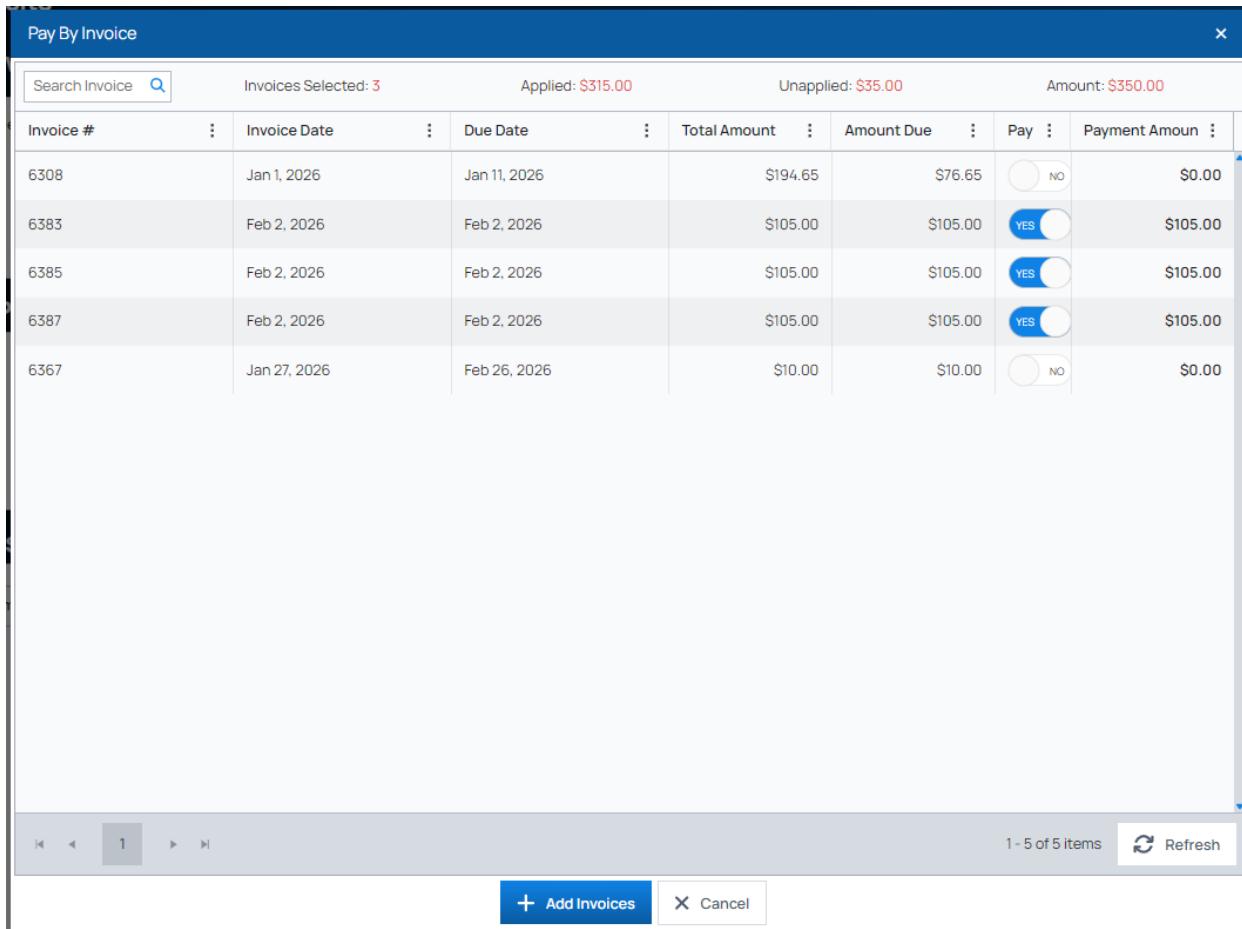
Complete the required fields. Be sure to enter an **Amount** in the Add Payment panel.

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 shows the 'New Deposit' and 'Add Payment' panels. The 'New Deposit' panel has fields for 'Deposit Amount' (\$350.00), 'Deposit Date' (2/2/2026), and 'Bank Account' (10102 - First National Bank). The 'Add Payment' panel has fields for 'Payment Date' (2/2/2026), 'Payment Type' (Cash), and 'Customer' (beesolver 2 - 4452). The 'Invoices' field contains 'Invoice Search: invoice #' and a '+' button, which is highlighted with a red box. Other fields in the 'Add Payment' panel include 'Customer Balance' (-\$11,006.73), 'Late Fee Due' (\$0.00), 'Auto Apply?' (radio button set to 'NO'), 'Amount' (\$350.00), 'Late Fee Amount' (\$0.00), 'Memo' (text box), and a green 'Apply to deposit' button.

This opens the Pay By Invoice popup:

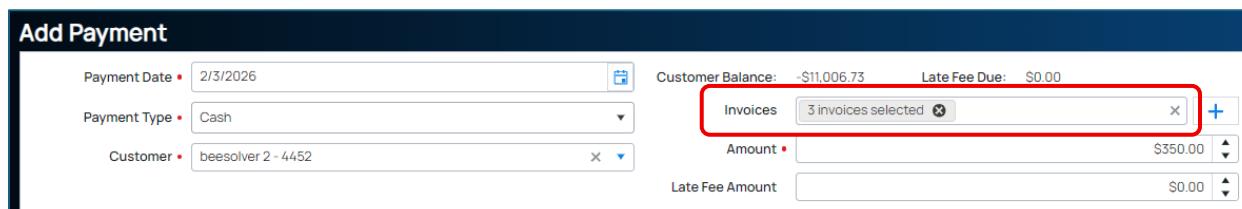


The Pay By Invoice popup displays a table of selected invoices. The table includes columns for Invoice #, Invoice Date, Due Date, Total Amount, Amount Due, Pay (a toggle switch), and Payment Amount. The 'Pay' column shows 'NO' for the first invoice and 'YES' for the others. The 'Payment Amount' column shows the full invoice amount for the first two and \$105.00 for the last three. A search bar at the top left and a 'Refresh' button at the bottom right are also visible.

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

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.



The Add Payment popup shows a section for selecting invoices. A red box highlights the 'Invoices' field, which displays '3 invoices selected' with a clear 'X' button. Other fields include Payment Date (2/3/2026), Payment Type (Cash), Customer (beesolver 2 - 4452), and amounts for Customer Balance (-\$11,006.73), Late Fee Due (\$0.00), Amount (\$350.00), and 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,

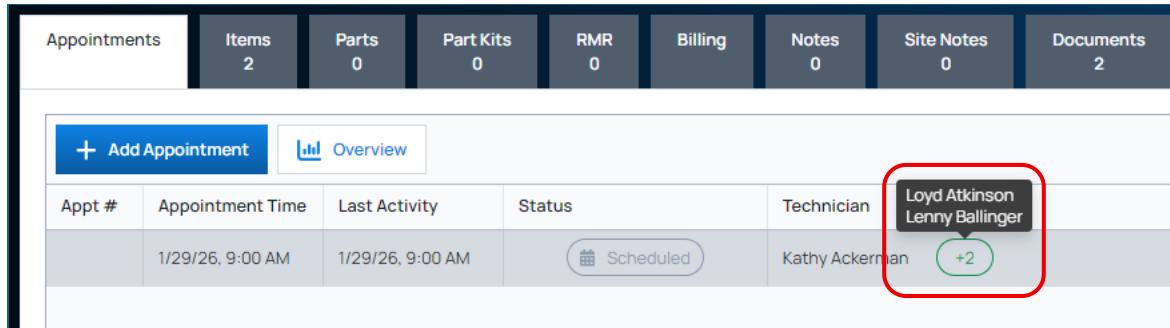
This email is a confirmation that we have processed Payment 73 on your account for the amount of \$62.15, using your credit card ending in 4242 on 12/12/2025. This payment has not yet been applied to an invoice.

**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.

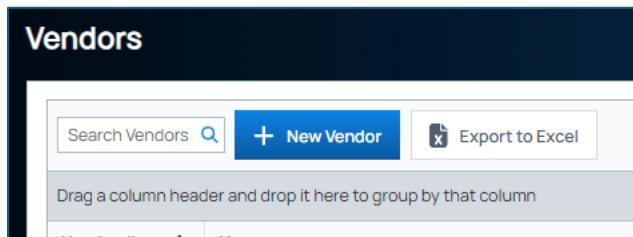


The screenshot shows an appointment details page. At the top, there is a navigation bar with various counts: Appointments (2), Items (0), Parts (0), Part Kits (0), RMR (0), Billing, Notes (0), Site Notes (0), and Documents (2). Below this is a toolbar with 'Add Appointment' and 'Overview' buttons. The main content area displays an appointment entry for 1/29/26, 9:00 AM, with a status of 'Scheduled'. The 'Technician' field shows 'Loyd Atkinson' and 'Lenny Ballinger' with a '+2' indicator. A red box highlights this technician list.

## Accounts Payable

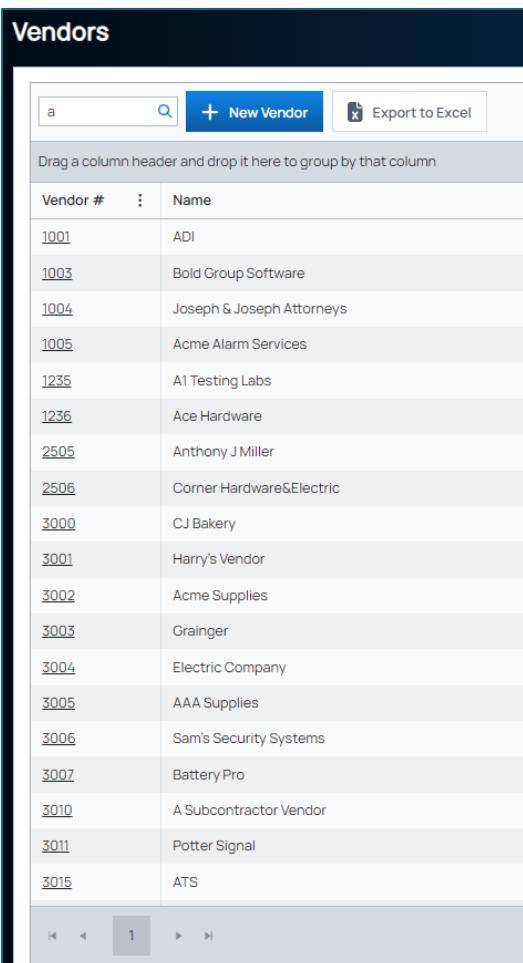
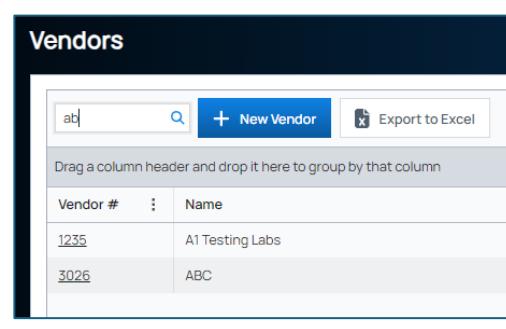
### Vendor Search [00142454]

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



The screenshot shows the 'Vendors' list page. At the top, there is a dark header with the word 'Vendors'. Below it is a search bar with the placeholder 'Search Vendors' and a magnifying glass icon. Next to it are buttons for '+ New Vendor' and 'Export to Excel'. Below the search bar is a message: 'Drag a column header and drop it here to group by that column'. The main area is a table with vendor data, though the rows are not clearly visible.

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.

<p>For example: This shows all vendors that contain the letter "a":</p>	<p>This shows all vendors that contain the letters "ab":</p>																																														
 <p>The screenshot shows a table of vendor data with columns for Vendor # and Name. The search bar at the top contains 'a'. The results include:</p> <table border="1"> <thead> <tr> <th>Vendor #</th> <th>Name</th> </tr> </thead> <tbody> <tr><td>1001</td><td>ADI</td></tr> <tr><td>1003</td><td>Bold Group Software</td></tr> <tr><td>1004</td><td>Joseph &amp; Joseph Attorneys</td></tr> <tr><td>1005</td><td>Acme Alarm Services</td></tr> <tr><td>1235</td><td>A1 Testing Labs</td></tr> <tr><td>1236</td><td>Ace Hardware</td></tr> <tr><td>2505</td><td>Anthony J Miller</td></tr> <tr><td>2506</td><td>Corner Hardware&amp;Electric</td></tr> <tr><td>3000</td><td>CJ Bakery</td></tr> <tr><td>3001</td><td>Harry's Vendor</td></tr> <tr><td>3002</td><td>Acme Supplies</td></tr> <tr><td>3003</td><td>Grainger</td></tr> <tr><td>3004</td><td>Electric Company</td></tr> <tr><td>3005</td><td>AAA Supplies</td></tr> <tr><td>3006</td><td>Sam's Security Systems</td></tr> <tr><td>3007</td><td>Battery Pro</td></tr> <tr><td>3010</td><td>A Subcontractor Vendor</td></tr> <tr><td>3011</td><td>Potter Signal</td></tr> <tr><td>3015</td><td>ATS</td></tr> </tbody> </table>	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	 <p>The screenshot shows a table of vendor data with columns for Vendor # and Name. The search bar at the top contains 'ab'. The results include:</p> <table border="1"> <thead> <tr> <th>Vendor #</th> <th>Name</th> </tr> </thead> <tbody> <tr><td>1235</td><td>A1 Testing Labs</td></tr> <tr><td>3026</td><td>ABC</td></tr> </tbody> </table>	Vendor #	Name	1235	A1 Testing Labs	3026	ABC
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## 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.