



Managely Release Notes

February 2026

Version 5.3.63

MANAGELY[®]

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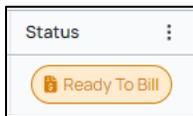
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Enhancements

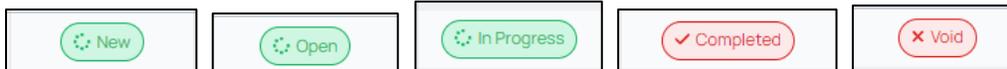
Accounts Receivable

Changed Color Scheme for Work Order Status [00150519]

The color for the Ready To Bill status was a yellow that was difficult to read when using the default Managely theme colors. To help improve readability, we made the status indicator a darker yellow with a lighter yellow background:



In addition, we changed the colors of the other status indicators to improve readability. These are examples:



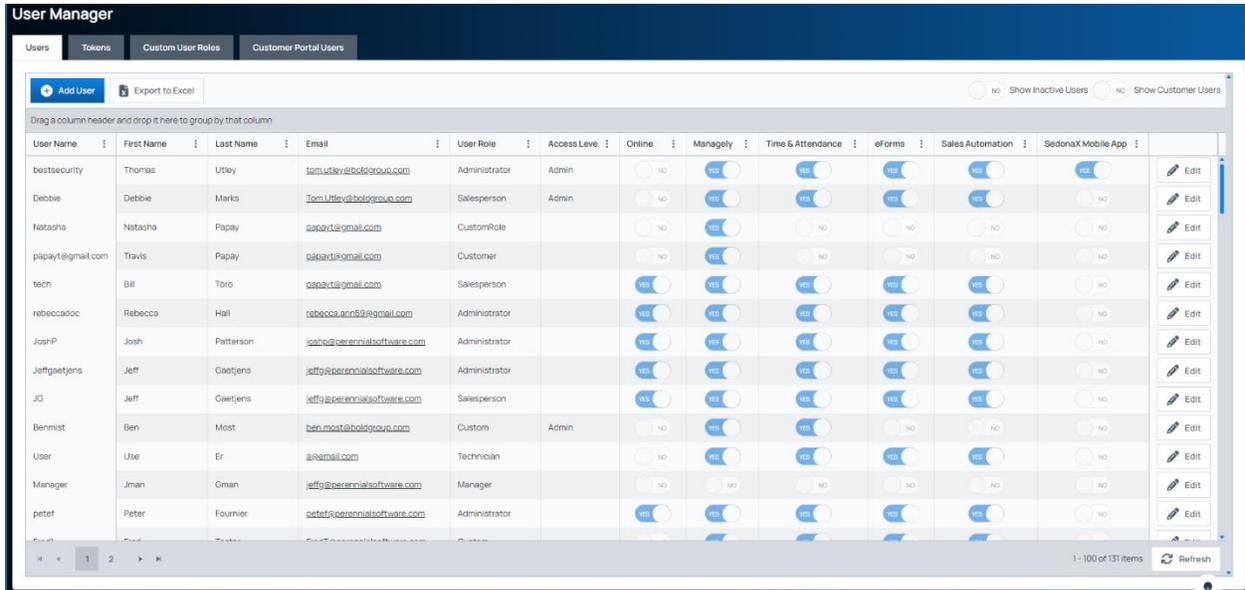
Users will see these color changes on the Open Work Order grid; Void Work Orders grid; Closed Work Orders grid; Change Orders grid; Customer Work Orders grid; and Work Order Details.

Setup

Added User Licenses to Customer Grid [00138735]

We added a way to see which applications users are licensed for in the grid. The User Manager page now has additional columns: Managely, Time & Attendance, eForms, Sales Automation, and SedonaX Mobile

App. These columns show read-only a YES/NO switch so users can quickly see the applications that other users are licensed for. Users can sort and filter these new columns in the grid.



To change user access to any applications, click **Edit** to open the Edit User page.

These columns are not visible for customer users or for inactive users.

Application Corrections

Error Message when trying to use Approval Rules on Proposals - this feature is not working for us at all [00143615]

This was caused by the search using the wrong database column. We fixed this so the proposal approval flow works correctly.

Sales Tax Report issues [00152440]

The Sales Tax Report was much longer than it had been in the past caused by large gaps between customers, and the data on the report was not aligned.

We fixed these issues with the Sales Tax Report:

- Aligned all textboxes in details section
- Fixed bug where the TaxRateTextBox.Size was incorrectly set instead of TaxableAmountTextBox.Size
- Changed the TaxableAmountTextBox width to 0.9 inches

- Fixed textBox2 configuration by removing incorrect textBox1.Size and added the missing Location property
- All detail fields now display on the same horizontal line

Work orders being closed and adding line items [00153066]

We corrected a bug that occasionally added \$0 items to an invoice that were not on the work order.

Unable to add contact — data deleted after “String or binary data would be truncated” error [00151476]

When attempting to add a new contact to a customer, the system displayed an error: “String or binary data would be truncated.” After the error appeared, all entered the contact information is cleared/deleted from the form.

We fixed an issue with all the text fields in the customer contact add and edit form and the vendor/lead contact form.

Managely duplicated deposit again [00153409]

A user reported a duplicated deposit batch again. This has happened before and appears to happen randomly.

One scenario that caused this was refreshing the browser tab without waiting for the server to respond after applying a batch that was already saved. As a result, browser tab reloaded with saved progress and it was possible to apply the batch again.

To correct this, we made these changes: When a user tries to apply the same batch multiple times, there is an error; adding or updating a GL entry is not completed twice; and the page no longer navigates away to a previous page if there was an error. The system will remain on the page where a user clicked the Save button so no entered data is lost.

Proposals keep asking for approval, even if the approver approved it [00153060]

The issue was caused by the system improperly setting the proposal status. For example, instead of setting the proposal to Pending Approval, it was being set to Ready for Submission.

We fixed this so the proposal status will now be set correctly so the approval workflow functions as intended.

Customer page load error [00153795]

The customer page loaded with the scroll bar at the bottom instead of the top.

We fixed the scrolling behavior on the Customer Detail page to ensure smooth navigation.

Mapping missing - change order in Stages [00153794]

When users tried to change the order of a call list in Managely through Stages, they got a mapping error.

We corrected the issue that was causing a mapping error.

Balance Sheet Loading very slowly [00154085]

A user reported that the Balance Sheet loaded slower than normal.

We optimized the query for the balance sheet to improve its load time.

Issue with line spacing in memo section of invoice not matching typed format [00153983]

Users experienced an issue with the line spacing in the memo section of an invoice; the first two lines displayed correctly, while the final line did not.

We fixed this issue with the line display and formatting. In addition, we fixed the display of new line characters in the memo section of invoice details when not in Edit mode.

Can't Sort Type, Subtype, or GL on "Add Items" [00154629]

When adding items to an invoice, users could not sort type, subtype, or GL on the Add items screen.

We updated the column configuration so that users can sort on Type, Subtype, and GL on the Add Items screen.

Invoice auto-generates labor line items. Never used to happen [00155205]

A user reported there were extra labor line items showing on automatically generated invoices.

We resolved this issue with the resolution for *Work orders being closed and adding line items [00153066]*.