



Managely Release Notes

April 2026

Version 5.3.66

MANAGELY[®]

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Application Corrections

Data Error: Payment [number] linked to invoice [number] not visible in system [00155505]

A payment was linked to an inactive invoice that was not visible in the system.

The process for automatically applying payments to invoices applies payments to the oldest customer invoices; however, it included inactive invoices if they had an amount due. We fixed this so automatically applying payments will not apply payments to inactive invoices.

System warranty date field auto-populating when left blank [00155765]

The Warranty Date field, which is configured as not required, automatically populated with a date even after users removed the value and saved the record. This caused confusion, making users think there was a warranty date when there was not.

We fixed the date picker in the Date field so when users clear it, it stays cleared.

View email issue: On a particular customer on the emails tab, trying to click view and the page shows a loading symbol and then it disappears and nothing populates to view [00152811]

On the Customer detail page on the Emails tab, users clicked view; the page showed a loading symbol; and then it disappeared and nothing populated to view.

We fixed this issue so that users can view emails as expected. **Note:** The view button is hidden if there are no emails to view or if there is no body section on the email.

City not appearing on site address on invoice [001580790]

The city was not appearing on the site address on invoices, and it could not be added from the templates and forms for an invoice. (Customers with multiple locations need to see the city, not just address line 1 and the state.)

We added City to the Description on the invoice template. Invoices will now display the full site address including the city, ensuring complete and accurate address information for all invoices.

Recurring bills not working properly: We have credit set up to be due today and it did not generate, we had to generate this bill manually [00158082]

We resolved this issue by changing how the system handles these accounting records. It is now more efficient and handles multiple things at once.

When performing a part return, the part was not being returned to the selected warehouse [00157941]

We fixed this issue by making two changes: the system verifies that a user is entering a return operation, and if so, it puts the part back in the warehouse that the user selects.

Submit for approval feature not working [00158251]

When changing a proposal to sold and completing it, the option to create a work order or invoice did not appear, there was an error stating that it needed approval.

We fixed the Submit for Approval button so that when users submit a proposal for approval the system processes it correctly.

Part kits adding issue [00143050]

Salespeople could see the Part Kits tab and could click +Add Part Kits but the tab did not show them the part kits to choose from.

We fixed the permissions so that users with “Parts Add” or “Inventory” roles can access part kits.

PO Order and Shipping Dates Advancing by One Day [00158618]

The Order Date and Shipping Date on purchase orders were automatically advancing by one day after entry.

We fixed an issue with the date picker.