



Managely Release Notes

April 2026

Version 5.3.67

MANAGELY[®]

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Enhancements

CRM > Customers

Added Customer Events Tab

On the customer detail page (CRM > Customers > Customer # hyperlink), we added the Event Logs tab. This shows events that have occurred on the customer, such as invoices, recurring, work orders, etc.

Action	Entity	Message	User	Date
+ Add	Invoice - 20070	Invoice #6888 was Added	Utley, Thomas	4/17/26, 2:29 AM
+ Update	Recurring - 12165	RMR # 12165 was Updated	Utley, Thomas	4/17/26, 2:29 AM
+ Add	Invoice - 19940	Invoice #6759 was Added	Managely, Managely	4/11/26, 11:00 PM
+ Update	Recurring - 11114	RMR # 11114 was Updated	Managely, Managely	4/11/26, 11:00 PM
+ Update	Recurring - 12164	RMR # 12164 was Updated	Managely, Managely	4/11/26, 11:00 PM
+ Update	Recurring - 12165	RMR # 12165 was Updated	Managely, Managely	4/11/26, 11:00 PM
+ Update	Recurring - 12181	RMR # 12181 was Updated	Managely, Managely	4/11/26, 11:00 PM
+ Update	Recurring - 12182	RMR # 12182 was Updated	Managely, Managely	4/11/26, 11:00 PM
+ Update	Recurring - 13258	RMR # 13258 was Updated	Managely, Managely	4/11/26, 11:00 PM
+ Update	Recurring - 13284	RMR # 13284 was Updated	Managely, Managely	4/11/26, 11:00 PM
+ Update	Recurring - 13396	RMR # 13396 was Updated	Managely, Managely	4/11/26, 11:00 PM

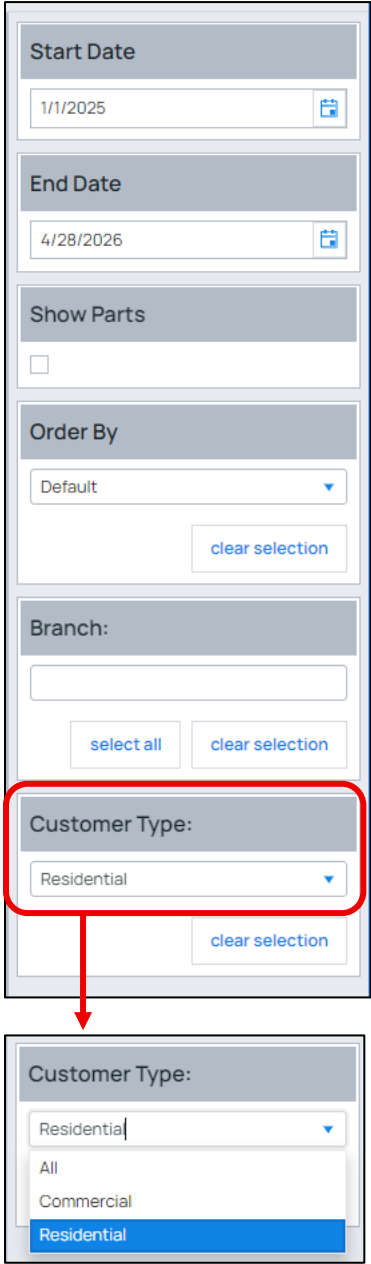
Users can expand a row by clicking the + sign beside the Action column to show more details.

Action	Description	Old Value	New Value
Update	Cycle End Date	4/28/2026 12:00:00 AM	5/28/2026 12:00:00 AM
Update	Next Invoice Date	3/28/2026 12:00:00 AM	4/28/2026 12:00:00 AM
Update	Last Invoice Date	2/28/2026 12:00:00 AM	3/28/2026 12:00:00 AM

Reports

Added Field for Sales Report to Filter by Residential or Commercial

On the Detailed Sales Report (Reports > Sales > Detail Sales Report) we added the Customer Type field. Users can make a selection in this field to filter the report by commercial, residential, or both (all).



Application Corrections

eForms not displaying information for customers [00155932]

When users sent eForms, the forms showed up with a blank page. Customers could not sign the forms since there is no information for them.

We fixed an issue where customers were unable to view or sign eForms — they would see a blank page instead of the form content. Forms now display correctly for customers.

Master Accounts are not calculating sales tax correctly [00158081]

We updated the sales tax calculation to derive tax from the selected customer site (sub-customer) instead of the master customer or system defaults. For each invoice line item, the system applies the tax code from the associated sub-customer/site so that tax-exempt sites are not charged and mixed-tax sub-customers are handled correctly across all line items.