



Managely Release Notes

June 2026

Version 5.3.69

MANAGELY[®]

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Enhancements

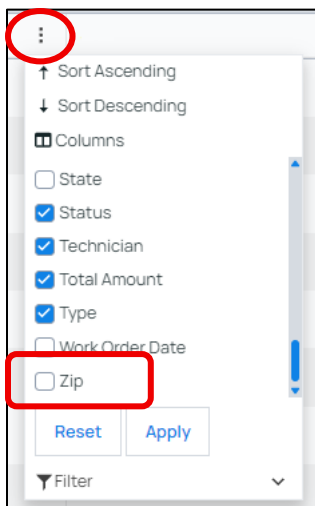
Accounts Receivable > Work Orders

Trip Charge Items now Appear on Generated Work Orders [00155455]

Trip charge items are now added to work orders generated from recurring work orders when the associated service level has other charges set to yes.

Added ZIP Code Column to Work Orders List Page

On the Work Orders page (Accounts Receivable > Work Orders) Open Work Order tab and the Closed Work Orders tab, we added the ZIP code as a column that users can add. By default, this column is hidden.



To add this column, click the kabob menu (three dots) beside a column name in the grid. Click **Columns**. Scroll down the list to find the new column. Select the checkbox beside it. Click **Apply**. The grid shows the selected column.

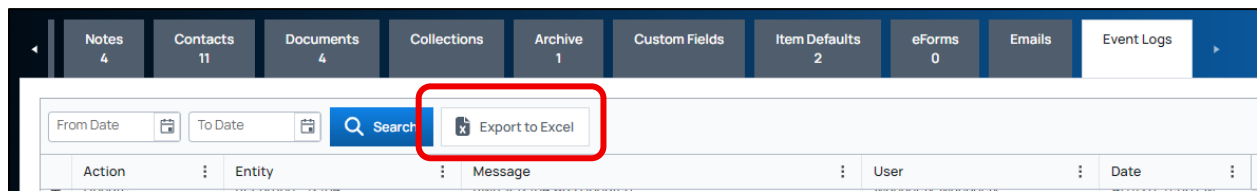
After adding this column, users can move it left or right on the grid, sort the column by ascending or descending values, and filter the values in the column.

CRM > Customers

Enhanced Event Log Functionality

We enhanced the Customer Event Log in Managely to improve audit capabilities, reporting, and usability. This was driven by SOX audit compliance requirements, providing an updated audit trail that can be run as needed.

On the Events Log tab on the customer detail page (CRM > Customers > Customer # hyperlink > Events Log tab), we added an Export to Excel button. Users can click this button to create and download an Excel file showing the data with the column headings shown on the grid. Leaving the From Date and To Date fields blank exports all events to the spreadsheet. Users can enter a From Date and To Date to narrow the number of events shown on the grid and export that list to a spreadsheet.



Application Corrections

Work order overview (additional technicians)[00158898]

The work order overview (Accounts Receivable > Work Orders > WO # hyperlink > Appointments tab > Overview button) was not showing hours from additional technicians in the total hour count.

We resolved this, so the overview includes hours for additional technicians.

Incorrect work order numbers displayed on home page (links open correct WOs) [00159343]

The PowerBI report showed the Work Order ID rather than the new Work Order Number column.

We updated the PowerBI summary page to read the work order number column instead of the work order ID column.

Managely test database is slow due to large amounts of data in select areas

The top-bar global search timed out (after 30 seconds) on large tenant databases.

We improved the search query to reduce the search time.