



Managely Release Notes

July 2026

Version 5.3.70

MANAGELY[®]

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Enhancements

Accounts Receivable

Improved RMR Generation Speed [00159571]

We optimized the invoice generation process. For dealers with many customers, generating thousands of invoices could take more than a couple hours. To improve efficiency and reduce the invoice generation time, we made several changes to database queries, standardized date/times for consistency across time zones, and optimized the way invoices were accessed and saved.

Notifying Technicians when an Appointment is Created [00143153]

We added a button on the appointment view to notify technicians when they are assigned to the appointment.

Appointment view form from a work order:

Appointment Details

Details

Breaks

Appointment Time	Jun 25, 2026, 12:00:00 AM	Dispatch Time	Jun 26, 2026, 12:07:00 PM
All Day	☒	Arrival Time	-
Technician	Thomas Wilson	Completed Time	-
Additional Technicians	-	Length (minutes)	0
Expected Length (in minutes)	1440	Billable minutes	0
Hourly Labor Rate	\$150.00	Total Labor Amount	\$0.00
Work Order Task	-		
Customer Confirmed	☐ NO		
PulseM	☐ OFF		

! Notify Customer

Notify Technician

Appointment form from the calendar:

Appointment #11181 | Aacott - 3438 | Work Order #2557

Appointment Details
Location
Breaks

Title
W/O 2557

Type
Work Order

All Day Event
NO

Start
6/16/2026 1:00 PM

End
6/16/2026 2:00 PM

Work Order

Customer
Aacott - 3438

Work Order
Fire Alarm Installation - 2557

Description
0/500

WO Desc
0/500

Dispatch
6/16/2026 12:30 PM
Now

Arrival
Now

Completed
Now

Technician
Kathy Ackerman

Select Available Technician
Available Technicians

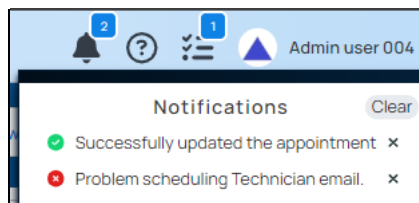
Additional Technicians

Sync
OFF

! Notify Customer
Notify Technician
Deliver

Save
Cancel
Delete

There is a notification message alerting users to see if the notification was successful or not.

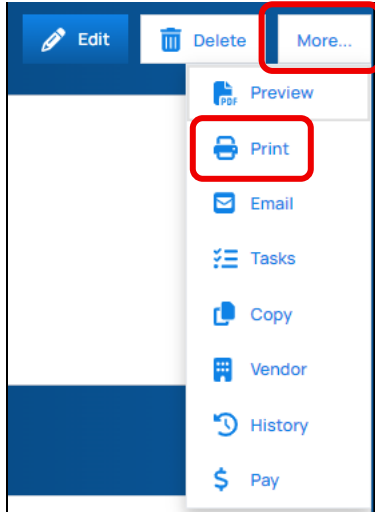


Accounts Payable

Vendor Bill Printing

Users can now print vendor bills to provide to other employees to the vendor for documentation. This feature adds the ability to generate professional PDF documents for vendor bills, receipts, and credits. To

generate these PDF documents, navigate to a bill detail page (Accounts Payable > Bills > Bills tab > Reference Number hyperlink > More button > Print), click the More button, and click Print.



This generates a PDF file that users can email, print and mail, and save for history.

Users can also generate PDF documents for receipts (Accounts Payable > Bills > Receipts tab> Reference Number hyperlink > More button > Print) and credits (Accounts Payable > Bills > Credits tab> Reference Number hyperlink > More button > Print).

The generated document shows your company logo and address (when enabled in Setup > Preferences; details for the bill such as bill number, date; due date, and PO reference (if applicable); vendor name and address; a financial summary, which include subtotal, item total, parts total, tax, payments/credits applied, and amount due; line items, which include description, quantity, rate, and amount; a memo field (if present); and the ship-to address (if present).

CRM

Event Log Tab Now Captures Changes from Other Tabs

The Event Log tab (CRM > Customers > customer # hyperlink > Events Logs tab) now shows changes from other tabs related to the same customer. These include changes for customer bill to, customer contacts, credit card, eCheck, customer item default rate, contract, notes, and contacts.

Setup/Customer Portal

Added Pay On Account Option [00160942]

On the customer portal, we added an option for customers to pay on account (in addition to the existing pay by invoice option). To enable this option, on the Preferences page (Setup > Preferences > Site Settings tab), set the new **Allow On Account Payment** switch to ON.

The screenshot shows the 'Preferences' page with the 'Site Settings' tab selected. The 'Allow On Account Payment' toggle switch is highlighted with a red box and is currently set to 'ON'.

Logos	Site Settings	Customer Portal	Late Fee	Locks	GL Account	Inventory
Site Theme	Managely					
Disable Mail Service	OFF					
Footer Message	This is the Footer Message from Site Settings					
Application Title	Sedona-X Bestsecurity					
Company Website						
Allow On Account Payment	ON					

On the customer portal, a customer can choose to pay By Invoice (an existing option) or On Account (a new option).

The screenshot shows the 'New Payment' page for a customer named 'Knowles, Beyonce - 1083'. The 'On Account' payment option is selected, and the transaction date is set to 6/15/2026.

< New Payment	
Knowles, Beyonce - 1083	
☐ By Invoice ☒ On Account	
Transaction Date	6/15/2026
Email Receipt To	[REDACTED]
Description	invoice 12676 for 261.80

When customers choose **On Account** and submit payments, they see a message: “Your payment has been received and will be applied to your invoices shortly.”

When processing the payment, the payment amount is subtracted from the balance due amount.

Managely users can see the customer payment on the customer detail page (CRM > Customers > Customer # hyperlink) Payments tab.

Application Corrections

RMR generation incorrectly sending out [00161122]

A user reported that the activation date for RMR was showing a day later than what was entered and it caused some of their customers to not be charged for all of their billed days due to proration. They state that they set up the activation date and next invoice date to both show as May 1 but the activation date saved as May 2 instead.

We changed this to use the correct date.

WIP report is not working, error is displayed after setting it up with the information based on the KB article [00163351]

WIP report did not work; an error was displayed after setting it up with the information based on the KB article.

We identified and corrected the issue that prevented the WIP report from running.

Unable to process Rate Increase Batches [00163941]

Users could not process rate increase batches; scheduled rate increases did not process.

The grid displaying RMR scheduled rate change batches did not filter out inactive records. We corrected this so now the grid filters out inactive and cancelled rate change batches, so the scheduled rate increases will process.