Managely Release Notes

August 2026

Version v5.3.71

MANAGELY®

Contents

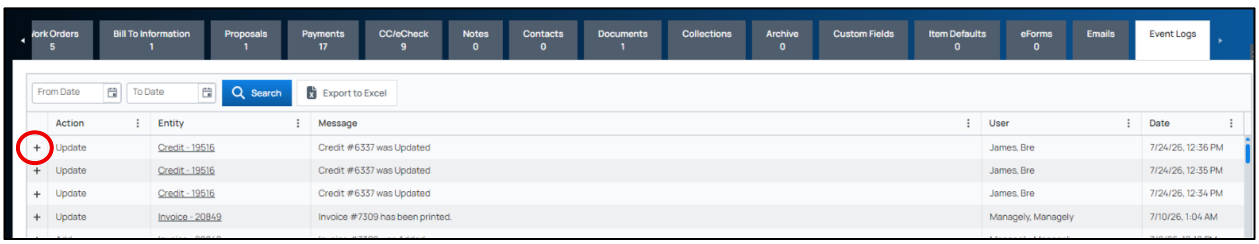
Enhancements

CRM > Customers

Audit Trail Excel Export: Added Before/After Field Values (SOX)

We improved the Event Log on the customer detail page (CRM > Customers > Customer # hyperlink > Events Log tab) to include before and after values. This can help with audit trails and Sarbanes-Oxley reporting. This is also included in the Excel spreadsheet that users can create from this tab.

To see the before and after values (shown on the grid as Old Value and New Value), click the plus sign on a row to expand the row details.



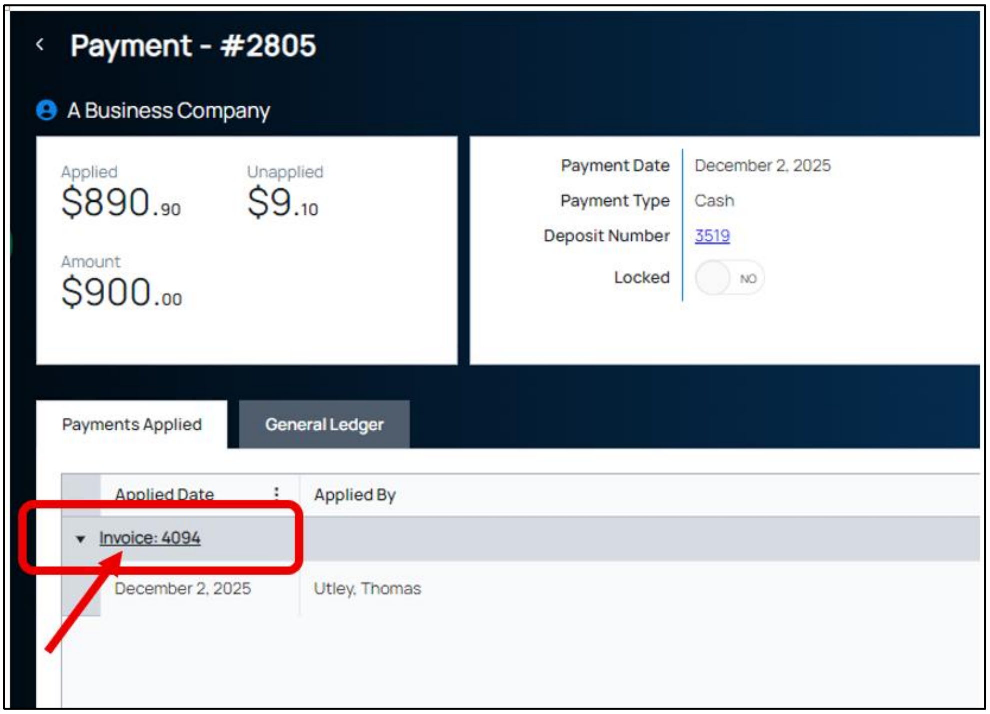
Click the minus sign to collapse the row details.

We improved the downloadable Excel spreadsheet (**Export to Excel** button) showing information exported from this tab. The spreadsheet now shows this information: Date (which shows the date and time of the change), User, Entity (what changed as in invoice, recurring, work order, etc.), Action (for example, Add or Update), Message, Field, Old Value, and New Value.

Payment Page: Added Invoice Hyperlink to Payments Applied Tab

The invoice number in the payment applied section of a payment record is now a hyperlink (CRM > Customers > Customer # hyperlink > Payments tab > Payment # hyperlink > Payments Applied tab).

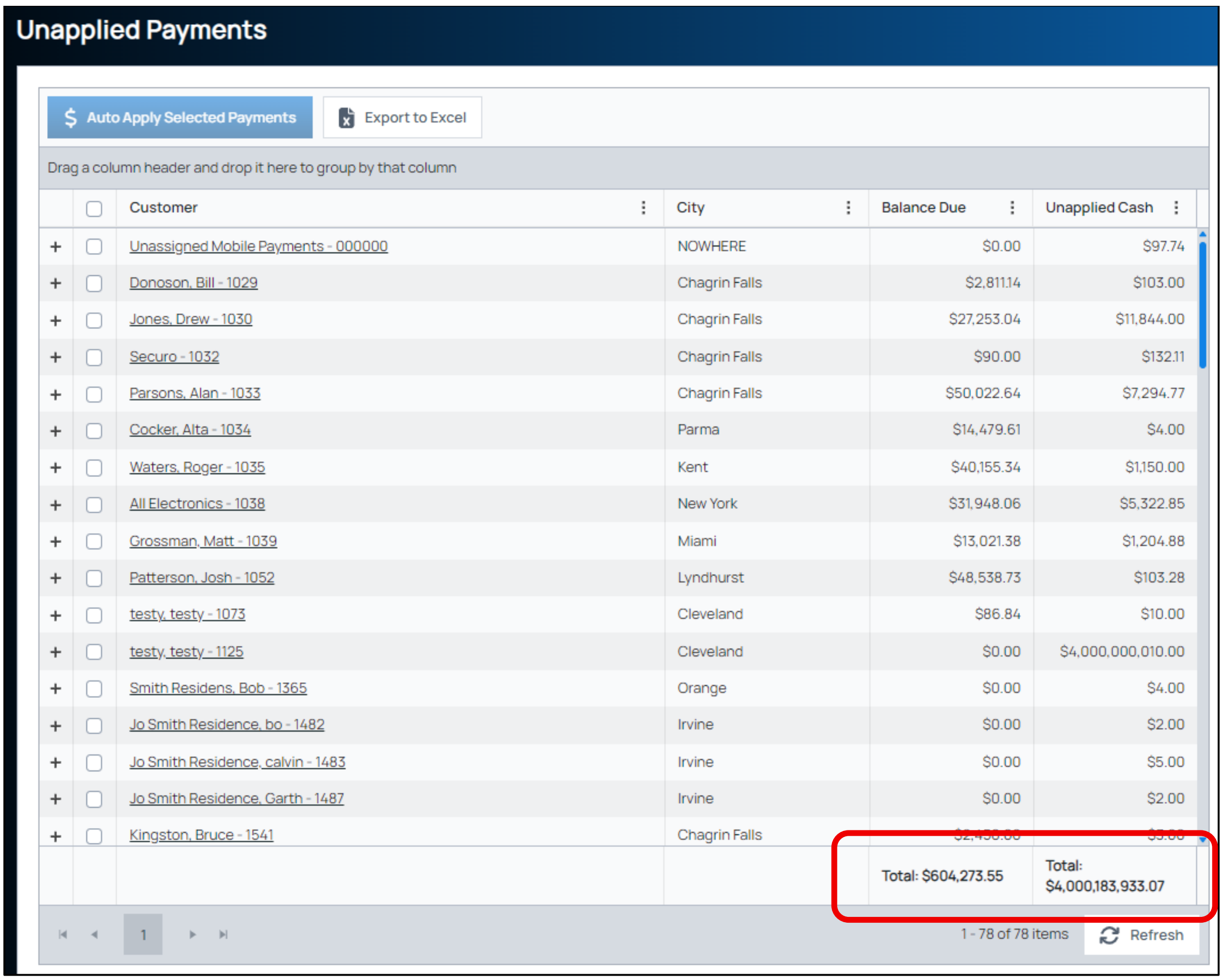
This allows users to navigate directly to the associated invoice.



Accounts Receivable > Payments

Unapplied Payments: Added Two Totals to Grid

We added totals for the Unapplied Payments page (Accounts Receivable > Payments > Unapplied). At the bottom of the grid there are totals for Balance Due and Unapplied Cash. These totals are for all balances due and unapplied cash, not just the page.


Unapplied Payments

Auto Apply Selected Payments | Export to Excel

Drag a column header and drop it here to group by that column

Customer	City	Balance Due	Unapplied Cash
Unassigned Mobile Payments - 000000	NOWHERE	$0.00	$97.74
Donoson, Bill - 1029	Chagrin Falls	$2,811.14	$103.00
Jones, Drew - 1030	Chagrin Falls	$27,253.04	$11,844.00
Securo - 1032	Chagrin Falls	$90.00	$132.11
Parsons, Alan - 1033	Chagrin Falls	$50,022.64	$7,294.77
Cocker, Alta - 1034	Parma	$14,479.61	$4.00
Waters, Roger - 1035	Kent	$40,155.34	$1,150.00
All Electronics - 1038	New York	$31,948.06	$5,322.85
Grossman, Matt - 1039	Miami	$13,021.38	$1,204.88
Patterson, Josh - 1052	Lyndhurst	$48,538.73	$103.28
testy, testy - 1073	Cleveland	$86.84	$10.00
testy, testy - 1125	Cleveland	$0.00	$4,000,000,010.00
Smith Residens, Bob - 1365	Orange	$0.00	$4.00
Jo Smith Residence, bo - 1482	Irvine	$0.00	$2.00
Jo Smith Residence, calvin - 1483	Irvine	$0.00	$5.00
Jo Smith Residence, Garth - 1487	Irvine	$0.00	$2.00
Kingston, Bruce - 1541	Chagrin Falls	[illegible]	[illegible]
		Total: $604,273.55	Total: $4,000,183,933.07

1 - 78 of 78 items | Refresh

These totals update when users select a checkbox beside one or more customers and click the **Auto Apply Selected Payments** button. If users filter the grid to show a single customer, the totals shown are for that customer. If there are no records in the grid, the totals show $0.

Reports

Added Salesperson Report

We added the Salesperson Report (Reports > Sales > Salesperson Report). This report provides a sales performance summary grouped by salesperson, covering a user-selected date range. It queries proposals (estimates) where the estimate date falls within the selected period and aggregates the results per salesperson.

GL Posting Report: Added Category Column

On the GL Posting Report, we added a Category column. If users export the report to Excel, they can use the category dimension to build departmental P&L statements, trailing income statements, and cash flow analyses outside of Managely.

Values in the Category column come from GL entries associated with an income or expense account that have a category assigned.

Application Corrections

Secondary technicians automatically removed from work order appointments

On appointments, after adding a secondary technician under the additional technician section, the system frequently removed that technician from the work order.

We fixed the logic for populating additional technicians in the calendar and for work order appointments. Note that the calendar and appointments will exclude technicians with an EmployeeID = 0 and duplicate technicians. Work orders will exclude inactive technicians.

AR Aging Report response time

Generating the AR Aging Report for large databases took more than 20 minutes.

We improved the efficiency of this report so that it generates more quickly.

Invoice/Credit Register response time

Generating the Invoice/Credit Register for large databases took about 10 minutes.

We improved the efficiency of the generation process for the invoice/credit register related to how the report calls the company name and register. This improves the response time.

Next CC/eCheck Funding Date displays incorrect month

On the Batch Automation setup screen, the Next CC/eCheck Funding Date preview value showed the wrong month. The funding month offset was being applied to the RMR Next Invoice Date instead of the Next RMR Run Date.

We changed the base date for the funding date calculation from process date to generation date and added the set date for consistency with how the other dates are computed.