



Managely Release Notes

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Enhancements

Reports > Customer

Added RMR Audit Tracking Report

We added a new report: Audit Tracking Report (Reports > Customers > Audit Tracking Report). This shows any RMR changes (before and after) for selected customers within the date range.

Customer Memo	Item Code	Branch	Qty	RMR Tracking Amt Before	RMR Tracking Amt After	Cycle	Tracking Date	Recurring Reason
3497-Barry's Bicycles								
13440-Discount		Default	0	0.00	100.00	M	06/04/2026	Auto Renewal
					100.00			
					100.00			
4538-TestCustomer, Onboarding								
13449-abcdefghijklmnopqrstuvwxyz		Chicago	0	0.00	25.00	M	08/10/2026	Add Additional Service
					25.00			
					25.00			
4552-TestCustomer, Onboarding								
13454-abcdefghijklmnopqrstuvwxyz		Chicago	0	0.00	25.00	M	08/10/2026	Add Additional Service
					25.00			
					25.00			
4638-TestCustomer, Onboarding								
13483-abcdefghijklmnopqrstuvwxyz		Chicago	0	0.00	25.00	M	08/20/2026	Add Additional Service
					25.00			
					25.00			
Total RMR Tracking					175.00			

Generated on 08/24/2026 13:49:57

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Preview

Users can enter a date range, choose a single customer or all customers, choose an order for the report, and select one or more branches (or all branches). Selecting the **Detail View** checkbox shows the RMR Tracking Amt Before and Amt After columns.

GL > Credit Cards

Credit Card Reconciliation Report

We added a credit card reconciliation report that is like the existing bank reconciliation report.

1. Navigate to GL > Credit Cards.

2. Click the Credit Card hyperlink.
3. Click the Reconciliation tab.
4. Click the Ending Date hyperlink. This opens the reconciliation record for the credit card.
5. At the top of the page, click the print button. This generates and downloads the Account Reconciliation Report as a PDF file.

The report body has these sections: Checks/Payments Reconciled, Deposits/Credits Reconciled, Deposits Outstanding, Payments Outstanding, and the Register Balance. The Checks/Payments Reconciled section and the Deposits/Credits Reconciled section have transaction rows that correspond to the GL entries reconciled in the record.

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Account Reconciliation Report

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For statement ending on: 6/30/2025

Account Name	Citibank	Service Charge	\$5.00
Beginning Balance	\$0.00	Total Debit Amount	\$100.00
Ending Balance	\$20.00	Total Credit Amount	\$100.00

Checks/Payments Reconciled

Date	Number	Vendor	Memo	Amount
6/13/2025	21468		Work In Progress Commission	\$100.00
6/30/2025	21651		Service Charge	\$5.00
			Total	\$105.00

Deposits/Credits Reconciled

Date	Number	Vendor	Memo	Amount
6/13/2025	21465		Work In Process Commission	\$100.00
6/30/2025	21652		Interest Earned	\$25.00
			Total	\$125.00

Statement Balance: \$20.00

Deposits Outstanding

Date	Number	Vendor	Memo	Amount
2/9/2023	17205		Work In Process Commission	\$1.89
			Total	\$1.89

Payments Outstanding

Date	Number	Vendor	Memo	Amount
6/20/2023	1000125	Acme Alarm Services	Vendor Payment 2084	\$325.29
10/12/2023	02095	Tri-Ed	Vendor Payment 2095	\$519.05
10/17/2023	88		Manual entry #88	\$88.00
1/29/2024	1000126		test memo	\$283.02
3/25/2024	20210		Deferred Commission	\$1,250.00
			Total	\$2,465.36

Register Balance: -\$2,443.47

Application Corrections

Three months in a row cycle invoices timed out when attempting to deliver them [00163006]

The system would spin indefinitely when users tried to download the batch of cycle invoices to print. There was no error, it just never completed.

We added a new endpoint to improve the response time for downloading batches of cycle invoices to an Excel spreadsheet.

Server timeout on larger work orders or work orders with several appointments, the server is taking over 30 seconds to clear out and close. This results in an error but does ultimately close [00163736]

On work orders with many parts (over 2000), the server was timing out and resulted in an error.

We optimized the database call to improve the response time for work orders that have many parts.

AR > Payments > CC/eCheck > Denied/Rejected - Each rejected payment shows "511" for the payment method instead of the actual last 4 of the card or account [00166029]

The last four digits on a credit card were being stored as an integer instead of a varchar. When a credit card had leading zeros, they were cutoff when saved. We changed the way the four digits are stored and added logic to add leading zeros back in if there are less than four digits.

Cannot open the extended warranty eForm, displays an error message [00167343]

This occurred when the document record existed but the actual file was missing. This was an issue related to data migration.

We corrected the data and improved the error message so that it tells users the issue instead of a generic error message.

The tech time report is displaying the SQL/internal work order number instead of the actual work order number [00167542]

We fixed the Tech Time report to display the actual work order number instead of the internal SQL primary key.