Managely Release Notes

September 2026 (updated October 2026)

Version 5.3.75 and 5.3.75.2

MANAGELY®

5.3.75.2 Patch

Salesperson Report is not displaying accurate values [00171080]

The Salesperson Report was showing incorrect totals for won, lost, and open proposals.

We fixed how proposals are counted:

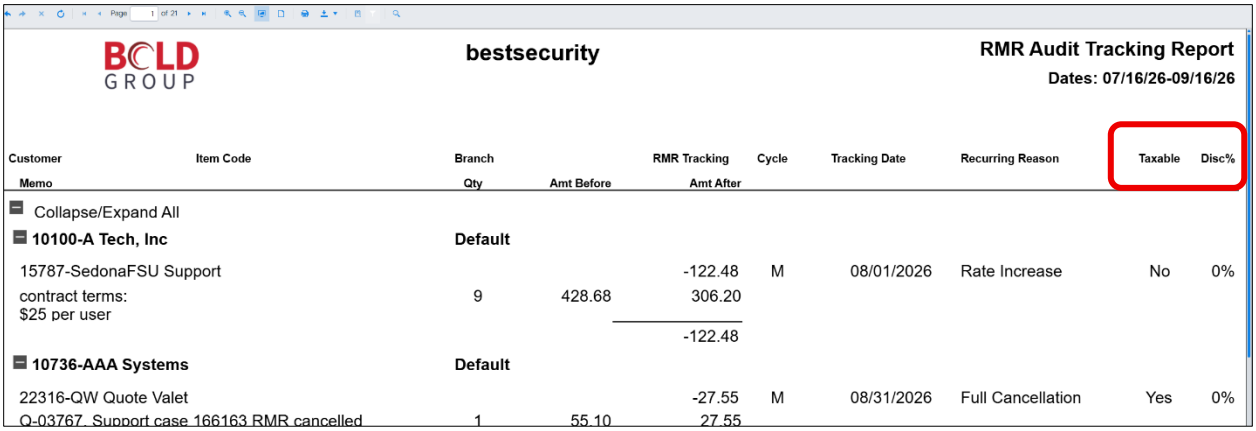
- Won: Proposals with a sold status are counted as won if they were closed within the report's date range.
- Lost: Proposals that were closed or rejected are counted as lost if they were closed within the date range. Previously, rejected proposals were missing from lost.
- Open: Proposals that are still in progress are counted as open if they were created on or before the report's end date. This covers statuses such as new, pending, needs revision, pending approval, and ready to submit.
- Proposals closed after the report period: If a proposal was created in the period but closed after the report's end date, the report now counts it as open. Previously it could show as won or lost when it had not been closed yet at that point.
- End date: Proposals created on the last day of the report range are now included. Before, some were left out, depending on the time of day they were created.

Enhancements

Reports

Added Tax and Discount Columns to RMR Audit Tracking Report and Filter for Invoices on Invoice/Credit Register Report

The RMR Audit Tracking Report (Reports > Customer > RMR Audit Tracking) now includes the tax and discount columns (Taxable and Disc%) so users can see these values.

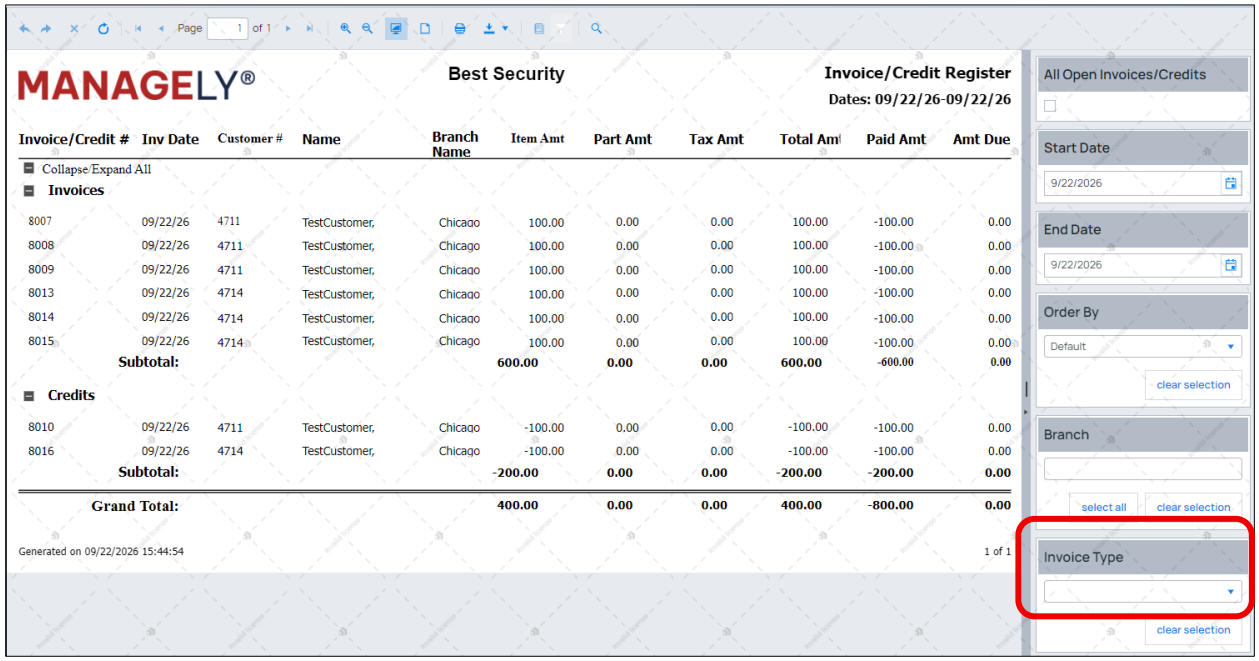


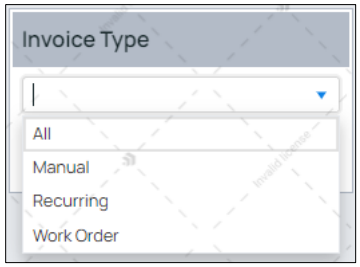
bestsecurity

RMR Audit Tracking Report
Dates: 07/16/26-09/16/26

Customer / Memo	Item Code	Branch / Qty	Amt Before	RMR Tracking / Amt After	Cycle	Tracking Date	Recurring Reason	Taxable	Disc%
Collapse/Expand All									
10100-A Tech, Inc		**Default**							
15787-SedonaFSU Support				-122.48	M	08/01/2026	Rate Increase	No	0%
contract terms: $25 per user		9	428.68	306.20					
				-122.48					
10736-AAA Systems		**Default**							
22316-QW Quote Valet				-27.55	M	08/31/2026	Full Cancellation	Yes	0%
Q-03767, Support case 166163 RMR cancelled		1	55.10	27.55					

On the Invoice/Credit Register Report (Reports > Accounts Receivable > Invoice/Credit Register), we added a filter for Invoice Type. Users can select an option (All, Manual, Recurring, Work Order) to filter the report by that invoice type. The field is optional. No selection or All includes all types.





Application Corrections

Changing “Needs Revision” Action to “None” Breaks Proposal Statuses [00168822]

On Setup > Proposals > Proposal Statuses, changing the **Action** value for the default Needs Revision Proposal Status from “Needs Revision” to “None” caused the Proposal Status Settings table to break. On a proposal, this prevented **Status** options from being available when editing the proposal.

We fixed this issue and fixed the proposal decline/approval process to not give an error if no status has the “Needs Revision” action.

Customer login issue - registered customer gets an error message “User doesn’t have access to this product” [00169922]

Customer users lost their Managely role during first-time registration or password reset. This prevented them from logging in and blocked access to the product with the error “User doesn't have access to this product”.

Customer users saved from the Customer Detail page > Customer Users tab were saved with an empty or incomplete role list, causing the issue. We resolved this, so the customer users have the correct role list and no longer receive the error.