



Managely Release Notes

September 2026

Version 5.3.75

MANAGELY®



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.

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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.

MANAGELY® Best Security Invoice/Credit Register
Dates: 09/22/26-09/22/26

Invoice/Credit #	Inv Date	Customer #	Name	Branch Name	Item Amt	Part Amt	Tax Amt	Total Amt	Paid Amt	Amt Due
Collapse Expand All Invoices										
8007	09/22/26	4711	TestCustomer,	Chicago	100.00	0.00	0.00	100.00	-100.00	0.00
8008	09/22/26	4711	TestCustomer,	Chicago	100.00	0.00	0.00	100.00	-100.00	0.00
8009	09/22/26	4711	TestCustomer,	Chicago	100.00	0.00	0.00	100.00	-100.00	0.00
8013	09/22/26	4714	TestCustomer,	Chicago	100.00	0.00	0.00	100.00	-100.00	0.00
8014	09/22/26	4714	TestCustomer,	Chicago	100.00	0.00	0.00	100.00	-100.00	0.00
8015	09/22/26	4714	TestCustomer,	Chicago	100.00	0.00	0.00	100.00	-100.00	0.00
Subtotal:					600.00	0.00	0.00	600.00	-600.00	0.00
Credits										
8010	09/22/26	4711	TestCustomer,	Chicago	-100.00	0.00	0.00	-100.00	-100.00	0.00
8016	09/22/26	4714	TestCustomer,	Chicago	-100.00	0.00	0.00	-100.00	-100.00	0.00
Subtotal:					-200.00	0.00	0.00	-200.00	-200.00	0.00
Grand Total:					400.00	0.00	0.00	400.00	-800.00	0.00

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All Open Invoices/Credits

Start Date

9/22/2026

End Date

9/22/2026

Order By

Default

clear selection

Branch

select all clear selection

Invoice Type

clear selection

Invoice Type

All

Manual

Recurring

Work Order

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.